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ABSTRACT

This task analysis guide is intended to help teachers and administrators develop instructional materials and implement competency-based education in a course on legal office procedures. Section 1 contains a validated task inventory for legal office procedures. For each task, applicable information pertaining to performance and enabling objectives, criterion-referenced measures, and suggested instructional activities and aids is provided. In this section, tasks are arranged by worker duty area only, and no attempt is made to sequence tasks in instructional order. Section 2 provides a description of the business education program that incorporates legal office procedures. These materials follow: course description, task sequence list that provides a suggested order of the task inventory for actual course instruction, and a course content outline. The instructional topics within the course content outline have been cross-referenced with corresponding task/competency codes from the task inventory in Section 1. An appendix lists reference materials useful in developing competency-based instructional course materials for legal office procedures. (YLB)

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ED302670

Legal Office Procedures:

Task Analyses

Commonwealth of Virginia
Department of Education
Vocational & Adult Education
Richmond, Virginia 23216

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Review Draft

CBE
COMPETENCY-BASED EDUCATION

CE051670

GUIDE APPLICATION

This Task Analyses guide is based on the following Dictionary of Occupational Titles (DOT) job titles contained in the occupational domain of clerical workers.

DOT Job Titles	DOT Code
Legal Secretary	201.362-010
Stenographer	202.362-014

Therefore, the guide is useful in developing and selecting instructional materials and in implementing competency-based education for the following program and course:

Program	Course
Secretarial, Word Processing, and Administrative Support Occupations (CIP Code 07.0601)	Legal Office Procedures (VA #6735)

Additional information concerning the application and use of this guide in program planning and development may be obtained from the following:

Business Education Service
Department of Education
P. O. Box 6Q
Richmond, Virginia 23216

TASK ANALYSES

FOR

LEGAL OFFICE PROCEDURES

Dr. B. June Schmidt

Project Director

This task analyses guide was developed for the Virginia Department of Education, Division of Vocational and Adult Education under the provisions of a Project Grant VA-82-C-132-2-AD-001 awarded to Virginia Polytechnic Institute and State University.

FOREWORD

In the next decade, businesses and industries in Virginia will require large numbers of skilled workers. Therefore, vocational education at the secondary and postsecondary levels will have the responsibility of preparing individuals for a variety of occupations.

Competency-based education (CBE) provides the preparation students need for entry into the Virginia work force. The CBE practice of recording competencies developed by students helps them to make a smooth transition between secondary and postsecondary programs when both levels of education are required for career training. In addition, CBE is effective in retraining workers who have been displaced because of changing technology.

This guide will assist teachers and administrators in developing instructional materials that meet the needs of students and industry and comply with the Virginia CBE standards for vocational and adult education.

S. John Davis
Superintendent of Public Instruction

Melvin H. Garner
Administrative Director
Vocational and Adult Education

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CONTENTS

INTRODUCTION 1

SECTION 1. TASK INVENTORY

General Information 3
Task Inventory for Legal Office Procedures 5
Duty Areas:
- Maintaining Financial Records 7
- Performing General Clerical Skills 11
- Performing Receptionist Activities 27
- Typewriting General Correspondence 39
- Typewriting Legal Instruments 47
- Processing Letters and Documents 77
- Observing Legal Office Ethics 99
- Seeking Employment 105
- Developing Personal Employability Skills 113

SECTION 2. PROGRAMS AND COURSES

General Information 127
Secondary Programs and Courses 129
Legal Office Procedures (6735):
- Description and Sequence 131
- Outline and Code 134

APPENDIX: Additional Information and Resources 135

INTRODUCTION

This task analyses guide is designed to be used in combination with the Business Education Service Area Resource in order to implement competency-based education in the course, Legal Office Procedures. The service area resource contains information that pertains to all programs within the Business Education area; the sections of that publication are entitled Occupational Information, Student Organization (FBLA), Classroom Management Systems, and Recording Systems. This task analyses guide contains the task inventory, suggested task sequence list, and content outline for the specific course, Legal Office Procedures. Detailed instructions for combined use of these two publications are contained within the service area resource.

Using the Task Analyses

Section 1 of the Task Analyses guide contains a validated task inventory for Legal Office Procedures. For each task, applicable information pertaining to performance and enabling objectives, criterion-referenced measures, and suggested instructional activities and aids is provided. In this section, tasks are arranged by worker duty areas only, and no attempt has been made to sequence tasks in instructional order.

Section 2 provides a description of the Business Education program which incorporates Legal Office Procedures. This is followed by a description of the course, a task sequence list which provides a suggested order of the task inventory for actual course instruction, and a course content outline. The

instructional topics within the course content outline have been cross-referenced with corresponding task/competency codes from the task inventory in Section 1.

It is suggested that the Section 2 task sequence list and course content outline be reviewed initially in order that any desired changes in sequencing of instruction be made. Once the sequencing is confirmed, instructional planning and implementation may proceed through referral to the Section 1 task/competency sheet noted beside each instructional topic within the outline.

SECTION 1.

TASK INVENTORY

One of the major characteristics of competency-based education (CBE) is that the course content is based upon actual jobs or tasks performed by the worker. In Virginia, the Department of Education has established standards for competency-based education. According to these standards, competencies must be role-relevant and based upon appropriate research. This standard states:

> Role-relevant competencies are identified and stated.
>
> The competencies, with standards, will be identified through V-TECS, IDECC, and other appropriate research. Advisory committees should be used to review competencies and standards. Competencies in the affective domain will be included. Role-relevant competencies for occupational preparation programs are those that specifically relate to the occupation for which the student is being prepared, as well as to the personal needs of the student. Role-relevant competencies are related also to orientation, exploration, and/or industrial arts experiences which have been identified for students.

Therefore, role-relevant jobs or tasks, called competencies in CBE, must be identified and validated before instructional materials are developed and subsequent instruction takes place. The task list in this task analyses guide is based on the following:

1. Job titles and descriptions found in the Occupational Outlook Handbook and the Dictionary of Occupational Titles
2. Input from business education supervisors and experienced business teachers
3. Competency-Based Course Outlines for Business and Office Education, Specialized Occupational Offerings, available through The Virginia Department of Education
4. V-TECS catalogs.

Information collected and reviewed from these sources was used to develop an initial task list. The next step involved in preparing the final task inventory was validation of the task list. Validation is essential if the information collected is to be useful in operating CBE courses and programs. The validation process involved clerical employees and their supervisors in attorneys' offices, a city police department, a circuit clerk office, the Supreme Court of Virginia, and paralegal organizations. This process was used to determine content appropriate for the Legal Office Procedures course at the secondary level. The validators indicated degree of importance of each task, based on a description of the course and level at which it is taught. Therefore, Legal Office Procedures instruction can logically be based on the validated task inventory included in this instructional guide.

The task analysis sheets are arranged by duty areas for the specific domain covered by the guide. Information contained on each sheet is as follows:

1. The task/competency for a given duty area which is performed by incumbent workers
2. Program and course application information
3. Performance and enabling objectives for instructional planning
4. Criterion-referenced measures or test items used to determine successful attainment of the task/competency by the student
5. Instructional activities and steps required for teaching the task/competency
6. Tools, equipment, and materials/supplies required to provide necessary instruction
7. References and audiovisual materials helpful in teaching the task/competency.

TASK INVENTORY FOR

LEGAL OFFICE PROCEDURES

DUTY AREAS

1. Maintaining Financial Records
2. Performing General Clerical Skills
3. Performing Receptionist Activities
4. Typewriting General Correspondence
5. Typewriting Legal Instruments
6. Processing Letters and Documents
7. Observing Legal Office Ethics
8. Seeking Employment
9. Developing Personal Employability Skills

DUTY AREA

1. MAINTAINING FINANCIAL RECORDS

TASKS/COMPETENCIES

1.1 Identify account situations that should be held in escrow

Application

DUTY AREA

1. MAINTAINING FINANCIAL RECORDS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

1.1 Identify account situations that should be held in escrow

COURSE

Legal Office Procedures
(VA #6735)

1.1

PERFORMANCE OBJECTIVE

P1.1 Given five account situations involving good faith deposits, an executor of an estate, attorney retainer fees, and withholding payment until repairs are made by landlord, identify those account situations that should be held in escrow. Identifications must be made with 100 percent accuracy.

SELECTED ENABLING OBJECTIVES

E1.1.1 Review terminology related to escrow accounts.

E1.1.2 Look at individual account.

E1.1.3 Check to see if funds are to be held until a specific action is taken.

E1.1.4 Check to see if funds are entrusted to an attorney.

E1.1.5 Determine if funds should be placed in escrow account.

CRITERION-REFERENCED MEASURE

C1.1 Given five account situations, identify those that should be held in escrow.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students the characteristics of an escrow account and review unfamiliar terminology (E1.1.1-E1.1.4).

2. Distribute practice sheets that contain various account situations involving an executor of an estate, good faith deposits, attorney retainer fees, or tenant's withholding of rent payment until landlord makes certain repairs. Have students determine which account situations should be placed in escrow. Check answers in class (E1.1.1-E1.1.5).

3. Using transparencies, display a number of accounts that have been placed in escrow and have students determine whether each has been properly labeled according to information available about the account (E1.1.1-E1.1.5).

SELECTED TOOLS AND MATERIALS

Overhead projector

SELECTED AUDIOVISUAL MATERIALS

Transparencies on various accounts placed in escrow

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.

DUTY AREA

2. PERFORMING GENERAL CLERICAL SKILLS

TASKS/COMPETENCIES

2.1 File documents, using an alphanumeric filing system

2.2 File documents by subject

2.3 Maintain and use a tickler file

2.4 Prepare records for new clients

2.5 Update records for clients

2.6 Maintain forms file

Application

DUTY AREA

2. PERFORMING GENERAL CLERICAL SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

2.1 File documents, using an alphanumeric filing system

COURSE

Legal Office Procedures (VA #6735)

2.1

PERFORMANCE OBJECTIVE

P2.1 Given ten documents and ten file folders containing other documents, correctly file the documents, using the alphanumeric method. Filing must be 100 percent accurate.

SELECTED ENABLING OBJECTIVES

E2.1.1 Collect items to be filed.

E2.1.2 Inspect documents.

E2.1.3 Assign numbers to each person, organization, or action with which attorney is dealing.

E2.1.4 Develop corresponding card files in which all names and cases are filed alphabetically.

E2.1.5 Mark each card with corresponding numbers of names and cases in numeric files.

E2.1.6 File documents in appropriate numeric file folders.

CRITERION-REFERENCED MEASURE

C2.1 File ten documents in an alphanumeric filing system with 100 percent accuracy.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have each student visit a law office that uses the alphanumeric filing system and have the system explained to them (E2.1.1-E2.1.6).
2. Review procedures for coding and sorting documents for alphanumeric filing (E2.1.1-E2.1.6).
3. Prepare transparencies (or use available ones) to illustrate different numeric filing systems, including terminal digit, middle digit, and consecutive number filing. Discuss transparencies with students (E2.1.1-E2.1.6).
4. Discuss the purpose of developing corresponding or cross-reference card files (E2.1.3-E2.1.5).
5. On the chalkboard, illustrate the steps involved in filing legal documents by number and preparing corresponding card files (E2.1.3-E2.1.5).
6. Distribute documents, files, cards, and card files and have students practice filing documents, using the alphanumeric method (E2.1.1-E2.1.6).
7. Prepare a bulletin board to display procedures to follow in alphanumeric filing (E2.1.1-E2.1.6).

SELECTED TOOLS AND MATERIALS

Overhead projector
Chalkboard
Legal documents
Files
Cards
Card files

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating different numeric filing systems
Transparencies illustrating steps involved in filing legal documents by number

SELECTED REFERENCES

Business Records Control, 5th edition. Bassett, Goodman, and Fosegan.
Filing Systems and Records Management, 2nd edition. Kahn, Yerian, and Stewart.
Indexing and Filing Workbook, 3rd edition. The H.M. Rowe Company.
Legal Office Procedures, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Progressive Filing, 9th edition. Stewart, Scharle, and Kahn.

Application

DUTY AREA

2 PERFORMING GENERAL CLERICAL SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

2.2 File documents by subject

COURSE

Legal Office Procedures
(VA #6735)

2.2

PERFORMANCE OBJECTIVE

P2.2 Given ten documents and file folders containing other documents, correctly file the documents by subject. Filing must be 100 percent accurate.

SELECTED ENABLING OBJECTIVES

E2.2.1 Collect items to be filed.

E2.2.2 Inspect documents.

E2.2.3 Determine and note subject categories to be used.

E2.2.4 Sort documents in alphabetical order by subject.

E2.2.5 File documents in appropriate subject files.

CRITERION-REFERENCED MEASURE

C2.2 File ten documents by subject with 100 percent accuracy.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students how filing by subject differs from alphanumeric filing (E2.2.3-E2.2.5).

2. Use transparencies to illustrate steps in filing by subject (E2.2.1-E2.2.5).

3. Bring in samples of legal forms files, attorneys' personal files, and office reference files and have students determine appropriate categories for filing the different information by subject (E2.2.3).

4. Distribute legal documents, legal forms files, office reference files, and file folders and have students practice filing by subject. Discuss any problems the students encounter (E2.2.1-E2.2.5).

SELECTED TOOLS AND MATERIALS

Overhead projector
Legal forms files, attorneys' personal files
Office reference files
File folders

SELECTED AUDIOVISUAL MATERIALS

Transparencies on steps to follow when filing by subject

SELECTED REFERENCES

Business Records Control, 5th edition. Bassett, Goodman, and Fosegan.
Filing Systems and Records Management, 2nd edition. Kahn, Yerian, and Stewart.
Indexing and Filing Workbook, 3rd edition. The H.M. Rowe Company.
Legal Office Procedures, 2nd edition. Bate and Casey.
Progressive Filing, 9th edition. Stewart, Scharle, and Kahn.

Application

DUTY AREA

2. PERFORMING GENERAL CLERICAL SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

2.3 Maintain and use a tickler file

COURSE

Legal Office Procedures
(VA #6735)

2.3

PERFORMANCE OBJECTIVE

P2.3 Given five tasks, accurately maintain a tickler file that requires the performance of these tasks.

SELECTED ENABLING OBJECTIVES

E2.3.1 Prepare folders with inserts tabbed 1 through 31 for days of month, a set of folders tabbed by month, and a "next year" folder.

E2.3.2 Record tasks to be performed on paper or cards.

E2.3.3 Insert paper or cards outlining tasks in the folders for the appropriate dates.

E2.3.4 After tasks are completed, destroy papers or cards if they represent one-time activities.

E2.3.5 If task is ongoing, reinsert paper or card in next appropriate time folder.

E2.3.6 On appropriate dates, remind appropriate people of responsibilities and deadlines.

CRITERION-REFERENCED MEASURE

C2.3 Accurately maintain a tickler file that requires the performance of five tasks.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss what a tickler file is and why such a file is important (E2.3.1-E2.3.6).

2. Display sample tickler file materiasl on bulletin board or on a chalkboard and discuss how the file is used (E2.3.1-E2.3.6).

3. Give students cards, a list of transactions to be completed, and a card file box and have them prepare a tickler file (E2.3.1-E2.3.6).

4. Have students role play office situations where they must use a tickler file (E2.3.1-E2.3.6).

5. Give students different items to be put on tickler file cards and have each student remind the teacher about his or her item on the appropriate day (E2.3.6).

SELECTED TOOLS AND MATERIALS

Bulletin board
Sample tickler file materials
Cards
List of transactions to be followed up
Card file box

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
Progressive Filing, 9th edition. Stewart, Scharle, and Kahn.

Application

DUTY AREA

2. PERFORMING GENERAL CLERICAL SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

2.4 Prepare records for new clients

COURSE

Legal Office Procedures
(VA #6735)

2.4

PERFORMANCE OBJECTIVE

P2.4 Given appropriate information and client record forms, prepare records for four new clients. All information must be 100 percent accurate.

SELECTED ENABLING OBJECTIVES

E2.4.1 Compile client information.

E2.4.2 Typewrite the following information on client record form:

a. client's name in solid caps;
b. names of other parties to action, if any;
c. type of action;
d. name of court and action number assigned to case, if matter requires court action;
e. each activity performed by attorney and time devoted to each.

E2.4.3 Prepare file folder with appropriate label for client.

CRITERION-REFERENCED MEASURE

C2.4 Prepare records for four new clients. All information must be 100 percent accurate.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Review rules for typewriting legal information onto a form, including proper spacing, alignment, and correction of errors (E2.4.2).

2. Discuss why it is essential for client information records to contain accurate information (E2.4.1-E2.4.3).

3. On the chalkboard, outline the information necessary to complete a client record (E2.4.2).

4. Have students prepare client records from rough draft information (E2.4.1-E2.4.3).

5. Distribute practice sheets with client records that contain incorrect spelling or typographical errors. Have students locate and correct the errors (E2.4.2).

SELECTED TOOLS AND MATERIALS

Chalkboard
Practice sheets
Rough-draft client information

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.

Application

DUTY AREA

2. PERFORMING GENERAL CLERICAL SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

2.5 Update records for clients

COURSE

Legal Office Procedures
(VA #6735)

2.5

PERFORMANCE OBJECTIVE

P2.5 Given appropriate information and four client records, update records to reflect new information. All information must be 100 percent accurate.

SELECTED ENABLING OBJECTIVES

E2.5.1 Compile new information.

E2.5.2 Typewrite any changes in personal information, such as change of address or employment, on the record.

E2.5.3 Post all information pertinent to legal action for the client as it occurs.

E2.5.4 Record number of hours devoted to proceedings, expenses incurred by the client, and disbursements made on behalf of the client, as they occur.

E2.5.5 Verify information for accuracy.

E2.5.6 Transfer expenses and disbursements to appropriate account sheet.

CRITERION-REFERENCED MEASURE

C2.5 Update four client records to include new information. All information must be 100 percent accurate.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss why it is essential to keep up-to-date records for clients (E2.5.1-E2.5.6).

2. Use transparencies to illustrate steps for updating client records (E2.5.1-E2.5.5).

3. On the chalkboard, outline problems that could occur if client record information becomes outdated (E2.5.1-E2.5.6).

4. Distribute practice sheets that contain various client records and new information about the clients. Have students update the client records (E2.5.1-E2.5.5).

5. Have students review client records updated by other students and ask them to note any inaccuracies (E2.5.5).

SELECTED TOOLS AND MATERIALS

Overhead projector
Practice sheets
Chalkboard

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to follow when updating client records

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.

Application

DUTY AREA

2. PERFORMING GENERAL CLERICAL SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

2.6 Maintain a forms file

COURSE

Legal Office Procedures
(VA #6735)

2.6

PERFORMANCE OBJECTIVE

P2.6 Given copies of legal documents, such as court documents, client documents, form letters, and memoranda, accurately establish a forms file. An acceptable rating must be received on each item of the attached checklist.

SELECTED ENABLING OBJECTIVES

E2.6.1 Separate documents by the following classifications:
- a. court documents
- b. client documents
- c. letters
- d. memoranda.

E2.6.2 Assemble documents within each classification and place in alphabetical order, arranging legal documents by titles and letters and memoranda by appropriate subject headings.

E2.6.3 Prepare file folder entitled "Forms."

E2.6.4 Place documents in file.

CRITERION-REFERENCED MEASURE

C2.6 Establish a forms file of legal documents so that an acceptable rating is received on each item of the attached checklist.

MAINTAIN FORMS FILE CHECKLIST
(2.6)

	YES	NO
1. Documents are separated according to the following classifications:	___	___
a. court documents		
b. client documents		
c. letters		
e. memoranda.		
2. Documents are arranged in correct alphabetical order.	___	___
3. Documents are placed in file entitled "Forms."	___	___

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students what a forms file contains (E2.6.1, E2.6.2).

2. On a bulletin board, display samples of documents that would be placed in a forms file (E2.6.1, E2.6.2).

3. On the chalkboard, outline the steps to follow when filing documents in a forms file (E2.6.1-E2.6.4).

4. Distribute various legal documents and file folders and have students file them in the forms file. Discuss work with the class (E2.6.1-E2.6.4).

5. Provide students with a basic forms file and review with them the documents contained, emphasizing types of information included on each form and how the information is entered (E2.6.1, E2.6.2).

SELECTED TOOLS AND MATERIALS

Bulletin board
Samples of documents for forms file
Chalkboard
Legal documents
File folders
Forms files

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.

DUTY AREA

3. PERFORMING RECEPTIONIST ACTIVITIES

TASKS/COMPETENCIES

3.1 Rearrange employer's (attorney's) calendar for appointment changes

3.2 Determine incoming calls that must be referred to attorney or supervisor

3.3 Prepare written telephone messages

3.4 Identify organizations and individuals that would be included in the legal secretary's personal directory

3.5 Prepare information needed by employer (attorney) for use during client conference

Application

DUTY AREA

3. PERFORMING RECEPTIONIST ACTIVITIES

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

3.1 Rearrange employer's (attorney's) calendar for appointment changes

COURSE

Legal Office Procedures (VA #6735)

3.1

PERFORMANCE OBJECTIVE

P3.1 Given simulated calls requesting new appointments, correctly rearrange employer's (attorney's) calendar for five appointment changes.

SELECTED ENABLING OBJECTIVES

E3.1.1 Locate current appointment calendar.

E3.1.2 Neatly indicate cancellation of appointment by drawing a line through it.

E3.1.3 Determine desired date and time of new appointment.

E3.1.4 Check calendar to see if new date and time are available; if unavailable, suggest alternate appointment.

E3.1.5 Confirm new appointment with caller and with attorney.

E3.1.6 Write new appointment on calendar and also on attorney's calendar.

CRITERION-REFERENCED MEASURE

C3.1 Correctly arrange employer's (attorney's) calendar for five appointment changes.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss the importance of maintaining an accurate calendar for the attorney (E3.1.1-E3.1.6).

2. On a bulletin board, display several samples of appointment book pages from local attorneys. Have students explain the information the pages contain (E3.1.1-E3.1.6).

3. On the chalkboard, list steps to follow when a client requests an appointment change (E3.1.1-E3.1.6).

4. Distribute blank appointment books (calendars) and have students schedule new appointments that are requested orally by other students (E3.1.2-E3.1.6).

SELECTED TOOLS AND MATERIALS

Chalkboard
Blank appointment books
Bulletin board

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.

Application

DUTY AREA

3. PERFORMING RECEPTIONIST ACTIVITIES

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK/COMPETENCY

3.2 Determine incoming calls that must be referred to attorney or supervisor

COURSE

Legal Office Procedures (VA #6735)

3.2

PERFORMANCE OBJECTIVE

P3.2 Given five simulated incoming calls, determine those that can be handled by a secretary and those that must be referred to an attorney or supervisor.

SELECTED ENABLING OBJECTIVES

E3.2.1 Establish policy with attorney or supervisor for handling phone calls.

E3.2.2 Ask who is calling and purpose of call.

E3.2.3 Answer routine questions briefly and concisely.

E3.2.4 If matter requires attention of attorney or supervisor, route the call to appropriate person.

CRITERION-REFERENCED MEASURE

C3.2 Given incoming calls, accurately determine those that can be handled by a secretary and those that must be referred to an attorney or supervisor.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students why it is important to be able to determine which calls can be handled by a secretary and which calls need to be referred to an attorney or supervisor (E3.2.1).

2. On the chalkboard, outline steps to follow when receiving incoming calls (E3.2.1-E3.2.4).

3. Have students role play situations that require determining whether to refer incoming calls to an attorney or supervisor or to handle the call. Have the other students evaluate the appropriateness of decisions (E3.2.1-E3.2.4).

4. Distribute case situations describing incoming calls and have students determine who should handle the calls (E3.2.2-E3.2.4).

SELECTED TOOLS AND MATERIALS

Chalkboard
Case situations
Teletrainers (available from C&P)

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

3. PERFORMING RECEPTIONIST ACTIVITIES

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

3.3 Prepare written telephone messages

COURSE

Legal Office Procedures
(VA #6735)

3.3

PERFORMANCE OBJECTIVE

P3.3 Given four simulated telephone calls, prepare written telephone messages. All information must be recorded with 100 percent accuracy.

SELECTED ENABLING OBJECTIVES

E3.3.1 Keep a message pad and pencil close to telephone.

E3.3.2 Enter the following information on message form, as appropriate:

a. person for whom call is intended;
b. date and hour call was received;
c. complete name of caller, organization, and telephone number;
d. other important information.

E3.3.3 Sign name or initials.

CRITERION-REFERENCED MEASURE

C3.3 Prepare four written telephone messages with 100 percent accuracy.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Show the film, How to Lose Your Best Customers Without Even Trying, and discuss contents of the film with students (E3.3.1-E3.3.3).

2. Use chalkboard of transparencies to illustrate steps to be followed in preparing telephone messages (E3.3.1-E3.3.3).

3. Have students prepare telephone messages from case situations (E3.3.2, E3.3.3).

4. Have students role play situations that require telephone messages to be prepared (E3.3.1-E3.3.3).

5. Have students exchange messages they have taken to evaluate them for legibility, accuracy, and completeness of information (E3.3.2, E3.3.3).

SELECTED TOOLS AND MATERIALS

Chalkboard
Overhead projector
Case studies
Telephone message forms

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to be followed in preparing telephone messages
Film: How to Lose Your Best Customer Without Even Trying. (available from local telephone company)

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Company.

Application

DUTY AREA	PROGRAM
3. PERFORMING RECEPTIONIST ACTIVITIES	SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)
TASK/COMPETENCY	**COURSE**
3.4 Identify organizations and individuals that would be included in the legal secretary's personal directory	Legal Office Procedures (VA #6735)

3.4

PERFORMANCE OBJECTIVE

P3.4 Given appropriate sources, identify organizations and individuals whose names, addresses, and telephone numbers are to be maintained in a personal directory. Entries must match those on instructor- or class-developed master list.

SELECTED ENABLING OBJECTIVES

E3.4.1 Identify organizations and individuals contacted on a regular basis.

E3.4.2 Compile addresses and telephone numbers of organizations and individuals, including:

a. courts, judges, and clerks;
b. offices of federal, state, or local tax bureaus;
c. legal associations;
d. doctors, dentists, insurance brokers, accountants, and other professional people;
e. attorney's or employer's home phone number and address, and addresses of other family members not living at home;
f. legal office supplies firms;
g. printers;
h. other outside service firms frequently used.

E3.4.3 Record the information in a personal directory.

CRITERION-REFERENCED MEASURE

C3.4 Identify organizations and individuals whose names, addresses, and telephone numbers are to be maintained in a personal directory. Entries must match those on instructor- or class-developed master list.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students what is meant by a personal directory and why one should be maintained (E3.4.1).

2. Have students identify persons or organizations that would be included in a personal directory and list them on chalkboard (E3.411, E3.4.2).

3. Demonstrate situations where a personal directory is useful to a legal secretary (E3.4.1).

4. Have students role play situations where they would use a personal directory (E3.4.1-E3.4.3).

5. Have students typewrite addresses and telephone numbers in a personal directory (E3.4.3).

SELECTED TOOLS AND MATERIALS

Telephone books
Chalkboard
Index cards (Rol-a-dex)
Instructor-developed master list for directory

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

3. PERFORMING RECEPTIONIST ACTIVITIES

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

3.5 Prepare information needed by employer (attorney) for use during client conference

COURSE

Legal Office Procedures (VA #6735)

3.5

PERFORMANCE OBJECTIVE

P3.5 Given client information and other legal documents, prepare information as needed during the employer's (attorney's) conference with the client. Client records and required legal forms must be completed with 100 percent accuracy.

SELECTED ENABLING OBJECTIVES

E3.5.1 Determine purpose of conference.

E3.5.2 Typewrite client record if one is not already available, including:
- a. client's name;
- b. names of other parties to action, if any;
- c. type of action.

E3.5.3 Complete any required legal forms.

E3.5.4 Compile and arrange needed information in folder.

CRITERION-REFERENCED MEASURE

C3.5 Prepare information needed by the employer (attorney) for a client conference. Client records and required forms must be completed with 100 percent accuracy.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students why a legal secretary prepares information for a client conference prior to the conference (E3.5.1-E3.5.4).

2. Use a chalkboard or transparencies to illustrate the material needed by an attorney for a client conference (E3.5.1-E3.5.4).

3. Distribute situation analyses that describe client conferences and have students prepare legal forms, client files, or other information needed for the various situations (E3.5.1-E3.5.4).

4. Analyze the consequences of a legal secretary's failure to provide appropriate information to an attorney for a client conference (E3.5.1-E3.5.4).

SELECTED TOOLS AND MATERIALS

Chalkboard
Overhead projector
Case studies
Legal forms
File folders

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating material needed by an attorney for a client conference

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.

DUTY AREA

4. TYPEWRITING GENERAL CORRESPONDENCE

TASKS/COMPETENCIES

4.1 Prepare mailable letters in legal format from handwritten, rough-draft copy and from dictation

4.2 Prepare mailable business letters with special features from handwritten, rough-draft copy and from dictation

4.3 Prepare a short memorandum in specified format from handwritten, rough-draft copy or from dictation

Application

DUTY AREA

4. TYPEWRITING GENERAL CORRESPONDENCE

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

4.1 Prepare mailable letters in legal format from handwritten, rough-draft copy and from dictation

COURSE

Legal Office Procedures (VA #6735)

4.1

PERFORMANCE OBJECTIVE

P4.1 Given two letters--one in handwritten, rough-draft form and the other by dictation--prepare mailable letters in legal format, with appropriate copies. The letters must contain no errors in typing, grammar, punctuation, or capitalization. Corrections made must not be noticeably visible, and, in the case of the dictated letter, any changes in wording must not alter the originally intended meaning.

SELECTED ENABLING OBJECTIVES

E4.1.1 Read handwritten copy or listen to dictation.

E4.1.2 Prepare and insert carbon pack, if directed to use carbons.

E4.1.3 Prepare typewritten copy. Follow these guidelines for legal format;
- a. introduce a series of related statements with a short, introductory paragraph closed with a colon;
- b. close different sections within the body of the letter with semicolons and the final section with a period;
- c. use commas, as required by text;
- d. use proper capitalization;
- e. follow proper rules for paragraph formation.

E4.1.4 Balance letter vertically and horizontally.

E4.1.5 Proofread and neatly correct any errors on original and copies.

CRITERION-REFERENCED MEASURE

C4.1 Prepare mailable letters from a handwritten, rough-draft copy and from dictation. Letters must be in legal format and must meet all criteria for mailability.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Review procedures for use of transcription equipment and for typewriting from a rough-draft copy (E4.1.1-E4.1.5).
2. Discuss standards a letter must meet to be considered mailable (E4.1.3-E4.1.5).
3. Review rules for typewriting letters, including adjustments of typewriter, use of correct format, and procedures for preparing copies (E4.1.2-E4.1.5).
4. Prepare a bulletin board display of model letters (E4.1.3, E4.1.4).
5. Distribute practice sheets that contain rough-draft copies of letters and have students prepare mailable letters from the copy (E4.1.1-E4.1.5).
6. Have students prepare mailable letters from dictated material (E4.1.1-E4.1.5).

SELECTED TOOLS AND MATERIALS

Bulletin board
Model letters
Practice sheets

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

4. TYPEWRITING GENERAL CORRESPONDENCE

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

4.2 Prepare mailable business letters with special features from handwritten, rough-draft copy and from dictation

COURSE

Legal Office Procedures (VA #6735)

4.2

PERFORMANCE OBJECTIVE

P4.2 Given two business letters with special features--one in handwritten, rough-draft form and one by dictation--prepare the letters in proper format, with appropriate copies. The letters must meet the criteria for mailability.

SELECTED ENABLING OBJECTIVES

E4.2.1 Read handwritten copy or listen to dictation.

E4.2.2 Prepare and insert carbon pack, if directed to use carbons.

E4.2.3 Prepare typewritten copy. Follow these guidelines for legal format:

a. introduce a series of related statements with a short, introductory paragraph closed with a colon;
b. close different sections within the body of the letter with semicolons and the final section with a period;
c. use commas, as required by text;
d. use proper capitalization;
e. follow proper rules for paragraph formation.

E4.2.4 Balance letter vertically and horizontally.

E4.2.5 Prepare each letter in specified format, using appropriate spacing and punctuation for special features.

E4.2.6 Proofread and neatly correct any errors on original and copies.

CRITERION-REFERENCED MEASURE

C4.2 Prepare two business letters with special features in the proper format and with appropriate copies. Letters must meet the criteria for mailability.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Use transparencies or chalkboard to illustrate letters that contain special features and discuss preparing these special features with the students (E4.2.5).

2. Distribute samples of typewritten letters with special features that contain spelling, typographical, or format errors. Have students locate these errors and correct them (E4.2.5).

3. Have students prepare mailable letters with special features from rough-draft copy or dictated material (E4.2.1-E4.2.6).

4. Have individuals from the legal community dictate letters with special features on recorded media, or submit in rough-draft form. Submit letters prepared by the students to legal personnel for review and feedback. Return letters to students to be redone (E4.2.1-E4.2.6).

SELECTED TOOLS AND MATERIALS

Overhead projector
Chalkboard
Practice sheets
Letters from legal community

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating letters that contain special features

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

4. TYPEWRITING GENERAL CORRESPONDENCE

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

4.3 Prepare a short memorandum in specified format from handwritten, rough-draft copy or from dictation

COURSE

Legal Office Procedures (VA #6735)

4.3

PERFORMANCE OBJECTIVE

P4.3 Given a handwritten, rough-draft copy or dictation, prepare a short memorandum in specified format, with appropriate copies. Any errors must be neatly corrected.

SELECTED ENABLING OBJECTIVES

E4.3.1 Read handwritten copy or listen to dictation.

E4.3.2 Prepare and insert carbon pack, if directed to use carbons.

E4.3.3 Typewrite memorandum in specified format.

E4.3.4 Balance memorandum vertically and horizontally.

E4.3.5 Proofread and neatly correct any errors on original and copies.

CRITERION-REFERENCED MEASURE

C4.3 Prepare a short memorandum in specified format, with appropriate copies. Any errors must be neatly corrected.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students the differences between a letter and a memorandum (E4.3.3).

2. Use transparencies to illustrate several examples of legal memorandums and discuss steps in typewriting a memorandum in the correct format (E4.3.1-E4.3.5).

3. Have student prepare memorandums from rough-draft and from dictation (E4.3.1-E4.3.5).

4. Display the best examples of students' work on a bulletin board (E4.3.3, E4.3.4).

SELECTED TOOLS AND MATERIALS

Overhead projector
Bulletin board
Examples of students' work

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to follow when preparing legal memorandum

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

TASKS/COMPETENCIES

5.1 Typewrite an affidavit

5.2 Typewrite a legal document containing an acknowledgment

5.3 Typewrite a legal sales contract

5.4 Typewrite a deed on a printed form

5.5 Typewrite a power of attorney

5.6 Typewrite a special power of attorney

5.7 Typewrite a valid will

5.8 Typewrite codicils to a valid will

5.9 Typewrite legal documents from various specialized areas

5.10 Typewrite agreements, using legal cap and prepared forms

5.11 Typewrite complaints (Motions for Judgement) and summons, using legal cap and printed forms

5.12 Typewrite interrogatories on legal cap, using correct format and style

5.13 Typewrite depositions, using legal cap

5.14 Typewrite subpoenas, using printed forms

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

5.1 Typewrite an affidavit

COURSE

Legal Office Procedures
(VA #6735)

5.1

PERFORMANCE OBJECTIVE

P5.1 Given an appropriate case description and affidavit form, typewrite an affidavit, with 100 percent accuracy. Corrections made must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.1.1 Compile necessary information from case description.

E5.1.2 Prepare an original and copies for opposing counsel and office files.

E5.1.3 Insert form, carbon pack, and copies in typewriter, with proper alignment.

E5.1.4 Typewrite information, as required.

E5.1.5 Proofread and neatly correct any errors, except for names and amounts that are not to be erased. If errors occur in these, retype, unless word processing equipment is available.

E5.1.6 If word processing equipment is used, locate errors on screen and correct them.

CRITERION-REFERENCED MEASURE

C5.1 Typewrite an affidavit with 100 percent accuracy. Corrections made must not be noticeably visible.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Define affidavit and discuss with students when affidavits are prepared (E5.1.1-E5.1.6).

2. Use transparencies that illustrate an affidavit and the steps to follow when typewriting an affidavit form (E5.1.1-E5.1.6).

3. Discuss with students why it is important to proofread the forms carefully after typewriting and before removing from typewriter (E5.1.5, E5.1.6).

4. Distribute affidavit forms and case descriptions and have students typewrite an affidavit (E5.1.1-E5.1.6).

5. Have students evaluate affidavits prepared by others and note any inaccuracies that occur in them (E5.1.5, E5.1.6).

SELECTED TOOLS AND MATERIALS

Overhead projector
Affidavit forms
Case descriptions

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to follow when typewriting an affidavit

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA	PROGRAM
5. TYPEWRITING LEGAL INSTRUMENTS	SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)
TASK / COMPETENCY	**COURSE**
5.2 Typewrite a legal document containing an acknowledgment	Legal Office Procedures (VA #6735)

5.2

PERFORMANCE OBJECTIVE

P5.2 Given appropriate information, typewrite a legal document containing an acknowledgment. All work must be 100 percent accurate, and corrections made must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.2.1 Typewrite a legal document.

E5.2.2 Typewrite acknowledgment clause below signature on legal document, including:

a. a statement of venue;
b. a statement of purpose of acknowledgment and the capacity of the signing party or parties;
c. a testimonium clause to precede the notary's signature in states where required;
d. signature line for notary.

E5.2.3 Proofread document and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C5.2 Typewrite a legal document containing an acknowledgment. All work must be accurate, and corrections made must not be noticeably visible.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Define an acknowledgment and discuss why an acknowledgment clause is added to a legal document (E5.2.2).

2. Distribute practice sheets that contain appropriate information for typewriting acknowledgments. Have students typewrite the acknowledgments in proper positions on legal forms (E5.2.1-E5.2.3).

3. Use transparencies to illustrate documents with acknowledgments that contain spelling and typographical errors. Have students locate the errors (E5.2.3).

SELECTED TOOLS AND MATERIALS

Practice sheets
Overhead projector

SELECTED AUDIOVISUAL MATERIALS

Transparencies of acknowledgments that contain errors

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

5.3 Typewrite a legal sales contract

COURSE

Legal Office Procedures
(VA #6735)

5.3

PERFORMANCE OBJECTIVE

P5.3 Given a preprinted bill of sale and necessary information, typewrite the sales contract, with all items properly aligned and information recorded with 100 percent accuracy.

SELECTED ENABLING OBJECTIVES

E5.3.1 Prepare original and copies for county clerk, purchaser, seller, and office files.

E5.3.2 Insert form in typewriter, with proper alignment.

E5.3.3 Typewrite all necessary information in appropriate spaces.

E5.3.4 Proofread and note any errors.

E5.3.5 If any errors occur, prepare another contract, as erasures will void bills of sale.

E5.3.6 If a word processor is used, locate errors on the screen and correct them.

CRITERION-REFERENCED MEASURE

C5.3 Typewrite a legal sales contract, with all items properly aligned and information recorded with 100 percent accuracy.

SELECTED INSTRUCTIONAL ACTIVITIES

1. On the chalkboard, outline different types of legal sales contracts.
2. Discuss with students why corrections will void a bill of sales unless a word processor is used (E5.3.5, E5.3.6).
3. Use transparencies to illustrate various sales contracts and the steps in typewriting these contracts (E5.3.1-E5.3.6).
4. Distribute preprinted bills of sale and appropriate information and have students typewrite sales contracts (E5.3.1-E5.3.6).
5. Have students review bills of sale prepared by others and note any inaccuracies (E5.3.4).

SELECTED TOOLS AND MATERIALS

Chalkboard
Overhead projector
Preprinted bill of sale

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating various sales contracts

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK/COMPETENCY

5.4 Typewrite a deed on a printed form

COURSE

Legal Office Procedures (VA #6735)

5.4

PERFORMANCE OBJECTIVE

P5.4 Given appropriate information and a deed form, typewrite the form. All items must be properly aligned, and information must be recorded neatly and with 100 percent accuracy.

SELECTED ENABLING OBJECTIVES

E5.4.1 Prepare original form and appropriate copies.

E5.4.2 Insert form in typewriter, with all items properly aligned.

E5.4.3 Typewrite all information in appropriate spaces.

E5.4.4 Proofread document, checking for correct spelling of names and accuracy of land description.

E5.4.5 Neatly correct any errors.

CRITERION-REFERENCED MEASURE

C5.4 Typewrite a deed on a printed form. All items must be properly aligned, and information must be recorded neatly and with 100 percent accuracy.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss what a deed involves and when it is prepared (E5.4.1-E5.4.5).

2. Use transparencies to illustrate steps to follow when typewriting a deed on a printed form (E5.4.1-E5.4.5).

3. Distribute printed forms and appropriate information and have students typewrite deeds (E5.4.1-E5.4.5).

4. Have students exchange deeds they have prepared and correct any incorrect spelling or typographical errors (E5.4.4, E5.4.5).

SELECTED TOOLS AND MATERIALS

Overhead projector
Printed forms

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to follow when typewriting deeds

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

5.5 Typewrite a power of attorney

COURSE

Legal Office Procedures
(VA #6735)

5.5

PERFORMANCE OBJECTIVE

P5.5 Given appropriate information, typewrite a power of attorney. All items must be properly aligned, and information must be recorded neatly and with 100 percent accuracy.

SELECTED ENABLING OBJECTIVES

E5.5.1 Prepare original and appropriate copies.

E5.5.2 Typewrite in legal manuscript style, including:

a. title in solid caps;
b. introductory clause in solid caps, followed by colon;
c. double spacing of body and acknowledgment;
d. on fourth line below body, signature line with principal's name to the right, signature line with attorney's name and address underneath, and signature line for notary public at left.

E5.5.3 Proofread document and neatly correct any errors, except names and amounts which should not be erased. If errors occur on these, retype, unless a word processor is used.

E5.5.4 If a word processor is used, locate errors on the screen and correct them.

CRITERION-REFERENCED MEASURE

C5.5 Typewrite a power of attorney, with all items properly aligned, all information recorded with 100 percent accuracy, and all corrections made neatly.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss what a power of attorney is and when a power of attorney is used (E5.5.1-E5.5.4).

2. Use transparencies to illustrate the proper steps to follow when typewriting a power of attorney (E5.5.1-E5.5.4).

3. Distribute copies of powers of attorney that contain spelling or typographical errors, and have students locate and correct the errors (E5.5.3, E5.5.4).

4. Distribute practice sheets that contain appropriate information and have students typewrite powers of attorney (E5.5.1-E5.5.4).

SELECTED TOOLS AND MATERIALS

Overhead projector
Copies of typewritten powers of attorney
Practice sheets

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to follow when typewriting a power of attorney

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK/COMPETENCY

5.6 Typewrite a special power of attorney

COURSE

Legal Office Procedures (VA #6735)

5.6

PERFORMANCE OBJECTIVE

P5.6 Given appropriate information, typewrite a special power of attorney. All items must be properly aligned, and information must be 100 percent accurate. Corrections made must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.6.1 Prepare original and appropriate copies.

E5.6.2 Typewrite all information, including:

a. name of person being granted special power of attorney;
b. explanation of specific--right, single-spaced;
c. below power of attorney, the signature line for person giving power of attorney, a signature line with attorney's name and address underneath, and a signature line for notary public at left.

E5.6.3 Proofread document and neatly correct any errors, except names and amounts which should not be erased. If errors occur on these, retype, unless a word processor is used.

E5.6.4 If a word processor is used, locate errors on the screen and correct them.

CRITERION-REFERENCED MEASURE

C5.6 Typewrite a special power of attorney, with all items properly aligned, all information 100 percent accurate, and all corrections made neatly.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with the class the differences between a power of attorney and a special power of attorney (E5.6.2).

2. On the chalkboard, outline the features which are different when typewriting a special power of attorney (E5.6.2).

3. Distribute practice sheets that contain appropriate information, and have students typewrite a special power of attorney (E5.6.1-E5.6.4).

SELECTED TOOLS AND MATERIALS

Chalkboard
Practice sheets

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

None identified

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK/COMPETENCY

5.7 Typewrite a valid will

COURSE

Legal Office Procedures
(VA #6735)

5.7

PERFORMANCE OBJECTIVE

P5.7 Given appropriate information, typewrite a valid will. Information must be 100 percent accurate, and corrections must be made neatly.

SELECTED ENABLING OBJECTIVES

E5.7.1 Prepare original for client and copy for office files.

E5.7.2 Typewrite all necessary information in proper style, with:

a. title in solid caps, double-spaced, one and one-half inch from top of page;
b. body double-spaced;
c. items in solid caps, centered;
d. signature line, with testator's or testatrix's name underneath;
e. signature lines and addresses for witnesses;
f. page numbers.

E5.7.3 Proofread documents and neatly correct any errors, with the exception of names and amounts which should not be erased. If errors occur on these, retype, unless a word processor is used.

E5.7.4 If a word processor is used, locate errors on the screen and correct them.

CRITERION-REFERENCED MEASURE

C5.7 Typewrite a valid will with 100 percent accuracy. All corrections must be made neatly.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students why wills are prepared (E5.7.1-E5.7.4).

2. Obtain standard wills or will clauses and discuss them with students (E5.7.1-E5.7.4).

3. Use transparencies to illustrate steps to follow when typewriting a will (E5.7.1-E5.7.4).

4. Distribute practice sheets containing appropriate information, and have students typewrite a will (E5.7.1-E5.7.4).

5. Have students review wills prepared by others and note any inaccuracies that occur (E5.7.3, E5.7.4).

SELECTED TOOLS AND MATERIALS

Samples of standard wills or will clauses
Overhead projector
Practice sheets

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to follow when typewriting a will

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

5.8 Typewrite codicils to a valid will

COURSE

Legal Office Procedures
(VA #6735)

5.8

PERFORMANCE OBJECTIVE

P5.8 Given the appropriate information and a typewritten will, typewrite two codicils to a valid will. All items must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.8.1 Prepare original for client and copy for office files.

E5.8.2 Typewrite codicil in legal manuscript style, including:
- a. standard rules for margins, paragraph indentions, and spacing between lines;
- b. heading in solid caps and centered;
- c. signature line, with name of testator or testatrix underneath;
- d. attestation clause, with signature and address lines for three witnesses;
- e. signature line, with attorney's name and address.

E5.8.3 Proofread document and correct any errors, except names and amounts which should not be erased. If errors occur on these, retype, unless a word processor is used.

E5.8.4 If a word processor is used, locate errors on the screen and correct them.

CRITERION-REFERENCED MEASURE

C5.8 Typewrite two codicils to a valid will, with all items 100 percent accurate and all corrections neatly made.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with the class what a codicil to a will is (E5.8.1-E5.8.4).

2. On the chalkboard, outline steps for typewriting a codicil to a will (E5.8.1-E5.8.4).

3. Distribute copies of a typewritten will and appropriate information for preparing a codicil. Have students typewrite a codicil to a will (E5.8.1-E5.8.4).

4. Prepare a bulletin board display of correctly prepared wills, with accompanying codicils (E5.8.1-E5.8.4).

SELECTED TOOLS AND MATERIALS

Chalkboard
Copies of a typewritten will
Bulletin board

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK/COMPETENCY

5.9 Typewrite legal documents from various specialized areas

COURSE

Legal Office Procedures (VA #6735)

5.9

PERFORMANCE OBJECTIVE

P5.9 Given appropriate source material from specialized areas, such as real estate or litigation, typewrite two legal documents. All items must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.9.1 Compile information.

E5.9.2 Prepare original and appropriate copies.

E5.9.3 Typewrite documents, as appropriate for specialized area.

E5.9.4 Include all necessary information.

E5.9.5 Proofread documents and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C5.9 Typewrite two legal documents from specialized areas. All items must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED INSTRUCTIONAL ACTIVITIES

1. On a bulletin board, display samples of legal documents from specialized areas.

2. Discuss with students how to typewrite these different specialized area legal documents (E5.9.1-E5.9.5).

3. Distribute practice sheets that contain information about different specialized area legal documents, and have students typewrite the appropriate legal documents (E5.9.1-E5.9.5).

4. Have students proofread documents they have typewritten in class and discuss any problems that seem to occur frequently when typewriting legal documents (E5.9.1-E5.9.5).

SELECTED TOOLS AND MATERIALS

Bulletin board
Samples of legal documents from specialized areas
Practice sheets

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

5.10 Typewrite agreements, using legal cap and prepared forms

COURSE

Legal Office Procedures (VA #6735)

5.10

PERFORMANCE OBJECTIVE

P5.10 Given appropriate source material, legal cap, and prepared form, typewrite agreements, using legal cap and prepared forms. All items must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.10.1 Prepare original for grantee, one copy for grantor, and one copy for office files.

E5.10.2 If using legal cap, typewrite in legal format, including:
- a. title in solid caps;
- b. names of parties in solid caps;
- c. first few words of beginning paragraphs in solid caps;
- d. word "Witnesseth" in solid caps, followed by colon;
- e. each condition numbered separately;
- f. signature lines for parties and witnesses, if applicable.

E5.10.3 If using prepared form, include proper alignment of each item and all necessary information that is mentioned above, but not included on form.

E5.10.4 Proofread documents and neatly correct any errors, except names and amounts which should not be erased. If errors occur on these, retype, unless a word processor is used.

E5.10.5 If a word processor is used, locate errors on screen and correct them.

CRITERION-REFERENCED MEASURE

C5.10 Typewrite agreements, using legal cap and prepared form. All items must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Display legal cap and a prepared form for typewriting a legal agreement. Ask students to identify differences between the two (E5.10.1-E5.10.3).

2. Use transparencies to illustrate steps to follow when typewriting an agreement (E5.10.1-E5.10.5).

3. Distribute legal cap and prepared forms, and have students typewrite the same agreement on both (E5.10.1-E5.10.4).

4. Have students review legal agreements prepared by others and note any inaccuracies (E5.10.4, E5.10.5).

SELECTED TOOLS AND MATERIALS

Overhead projector
Legal cap
Prepared forms

SELECTED AUDIOVISUAL MATERIALS

Transparencies on typewriting an agreement

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

5.11 Typewrite complaints (Motions for Judgment) and summons, using legal cap and printed forms

COURSE

Legal Office Procedures (VA #6735)

5.11

PERFORMANCE OBJECTIVE

P5.11 Given appropriate source material, legal cap, and printed forms, typewrite a complaint (Motion for Judgment) and a summons on legal cap and printed forms. All items must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.11.1 Prepare original, one copy for each defendant, and one copy for office files.

E5.11.2 If typewriting on legal cap, follow standard rules for margins, indentions, and spacing between lines.

E5.11.3 Include all parts of complaint (Motion for Judgment) and follow rules for typewriting, including:

a. caption in solid caps;
b. numbering of causes of action;
c. numbering of allegations;
d. signature line, with attorney's name and "Attorney for Plaintiff" underneath.

E5.11.4 Typewrite summons in appropriate format; including:

a. name of plaintiff in caps;
b. name of defendant in caps;
c. index number;
d. name of designated place of trial;
e. basis of venue;
f. plaintiff's address;
g. statement of summons;
h. name of attorney for plaintiff.

E5.11.5 If using printed forms, typewrite all information not included on form.

E5.11.6 Proofread documents and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C5.11 Typewrite a complaint (Motion for Judgment) and summons, using legal cap and printed forms. All items must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students when complaints (Motions for Judgment) and summons are prepared (E5.11.1-E5.11.6).

2. Use chalkboard to illustrate steps in typewriting complaints (Motions for Judgment) and summons (E5.11.1-E5.11.6).

3. Distribute legal cap and printed forms and, have students typewrite complaints (Motions for Judgment) and summons (E5.11.1-E5.11.6).

4. Have students exchange papers and correct any spelling or typographical errors (E5.11.6).

SELECTED TOOLS AND MATERIALS

Chalkboard
Legal cap
Printed forms

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Handbook for Legal Secretaries in Virginia. Michie Company Law Publishers.
Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA	PROGRAM
5. TYPEWRITING LEGAL INSTRUMENTS	SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)
TASK / COMPETENCY	**COURSE**
5.12 Typewrite interrogatories on legal cap, using correct format and style	Legal Office Procedures (VA #6735)

5.12

PERFORMANCE OBJECTIVE

P5.12 Given appropriate information and legal cap, typewrite two interrogatories. All information must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.12.1 Prepare original and appropriate copies.

E5.12.2 Typewrite documents in legal format, including:
- a. name of court in all caps;
- b. name of plaintiffs, et al, in all caps;
- c. name of defendants, et al, in all caps;
- d. index number;
- e. questions--numbered and double spaced between.

E5.12.3 Proofread documents and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C5.12 Typewrite two interrogatories, with 100 percent accuracy, and neatly complete corrections.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students when interrogatories are prepared (E5.12.1-E5.12.3).

2. Use chalkboard or transparencies to illustrate steps in typewriting interrogatories (E5.12.1-E5.12.3).

3. Distribute copies of interrogatories that contain spelling and typographical errors, or missing information, and have students locate and correct any errors (E5.12.3).

4. Distribute legal cap and appropriate information and have students typewrite interrogatories (E5.12.1-E5.12.3).

SELECTED TOOLS AND MATERIALS

Chalkboard
Overhead projector
Copies of interrogatories
Legal cap

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps in typewriting interrogatories

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA

5. TYPEWRITING LEGAL INSTRUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

5.13 Typewrite depositions, using legal cap

COURSE

Legal Office Procedures (VA #6735)

5.13

PERFORMANCE OBJECTIVE

P5.13 Given appropriate information and legal cap, typewrite a deposition, using legal cap. All work must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.13.1 Prepare original and appropriate copies.

E5.13.2 Typewrite information in appropriate legal format, including:
- a. double-spaced statement that witness has been duly sworn;
- b. name of witness in all caps;
- c. name of examiner in all caps;
- d. questions indicated by Q's;
- e. answers indicated by A's.

E5.13.3 Proofread document and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C5.13 Typewrite a deposition, using legal cap. All work must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students why depositions are used (E5.13.1-E5.13.3).

2. On the chalkboard, outline the information taken verbally from someone giving a deposition (E5.13.2).

3. Use transparencies to illustrate steps to follow when typewriting a deposition on legal cap (E5.13.1-E5.13.3).

4. Have students role play situations in which some of the students verbally give information for a deposition and other students take down the information in handwriting. Discuss with the class whether or not the information taken is appropriate and the nature of any problems encountered in recording information (E5.13.2).

5. Distribute case studies containing appropriate information, and have students typewrite depositions (E5.13.1-E5.13.3).

SELECTED TOOLS AND MATERIALS

Chalkboard
Overhead projector
Case studies

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to follow when typewriting depositions

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

Application

DUTY AREA	PROGRAM
5. TYPEWRITING LEGAL INSTRUMENTS	SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)
TASK / COMPETENCY	**COURSE**
5.14 Typewrite subpoenas, using printed forms	Legal Office Procedures (VA #6735)

5.14

PERFORMANCE OBJECTIVE

P5.14 Given appropriate information and printed forms, typewrite a subpoena, using the form. All work must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E5.14.1 Prepare an original and copies for sheriff and office files.

E5.14.2 Typewrite the necessary information, including:
- a. name and address of attorney requesting appearance;
- b. title of case;
- c. name and address of party being subpoenaed;
- d. name of party on whose behalf witness is to testify and designation of party as plaintiff or defendant.

E5.14.3 Proofread documents and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C5.14 Typewrite a subpoena, using printed forms. All work must be 100 percent accurate, and corrections must not be noticeably visible.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students when a subpoena is used (E5.14.1-E5.14.3).

2. Use transparencies to illustrate steps to follow when typewriting a subpoena on preprinted forms (E5.14.1-E5.14.3).

3. Distribute typewritten subpoenas that contain spelling or typographical errors, or missing information, and have students locate and correct the errors (E5.14.3).

4. Distribute preprinted forms and case studies that contain appropriate information. Have students typewrite subpoenas (E5.14.1-E5.14.3).

SELECTED TOOLS AND MATERIALS

Overhead projector
Typewritten subpoenas that contain errors
Case studies
Preprinted forms

SELECTED AUDIOVISUAL MATERIALS

Transparencies that illustrate steps to follow when typewriting a subpoena on a preprinted form

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.
Legal Typewriting, 2nd edition. Churchack, Yengel, and Hannigan.

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

TASKS/COMPETENCIES

6.1 Find and correct spelling or word-division errors in legal documents

6.2 Use correct legal and Latin terms as they occur in written or oral work

6.3 Transcribe recorded letters and documents

6.4 Transcribe letters from recorded dictation at typewriter

6.5 Prepare typewritten legal documents dictated from unfamiliar materials that contain legal/Latin terminology

6.6 Prepare typewritten legal documents from office-style dictation that contains legal/Latin terminology

6.7 Edit and revise legal correspondence for accuracy of content, clarity of expression, and appropriateness of style

6.8 Compose and prepare simple business correspondence

6.9 Operate text-editing equipment to record, edit, and play back legal correspondence

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.1 Find and correct spelling or word-division errors in legal documents

COURSE

Legal Office Procedures (VA #6735)

6.1

PERFORMANCE OBJECTIVE

P6.1 Given two legal documents and a dictionary, find and correct five spelling errors and five word-division errors. All work must be 100 percent accurate.

SELECTED ENABLING OBJECTIVES

E6.1.1 Read documents and locate errors.

E6.1.2 Correct errors in document by writing correctly spelled words or correctly divided words above those that are incorrect.

E6.1.3 Check work for accuracy.

CRITERION-REFERENCED MEASURE

C6.1 Find and correct five spelling errors and five word-division errors, with 100 percent accuracy.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Review with students the rules for dividing words in written work (E6.1.1-E6.1.3).

2. On the chalkboard, write a list of words frequently used in legal documents. Give the students dictionaries, and have them correctly divide the words (E6.1.2).

3. Distribute practice sheets containing legal documents with misspelled or incorrectly divided words. Have students locate and correct the errors (E6.1.1-E6.1.3).

SELECTED TOOLS AND MATERIALS

Chalkboard
Practice sheets
Dictionary

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
10,000 Legal Words: Spelled and Divided for Quick Reference. Kurtz, Adams, and Vezeau.

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.2 Use correct legal and Latin terms as they occur in written or oral work

COURSE

Legal Office Procedures (VA #6735)

6.2

PERFORMANCE OBJECTIVE

P6.2 Given five class assignments--three written and two oral--of two minutes duration each, use legal and Latin terms in completing the assignments. Written assignments must contain no more than two errors; oral assignments, no more than one.

SELECTED ENABLING OBJECTIVES

E6.2.1 Use the following legal and Latin terms in proper context: plaintiff, defendant, subpoena, interrogatories, codicil, contention, affidavit, Duces tecum, habeas corpus, and refuted.

E6.2.2 Correctly spell the terms as they occur in written work.

CRITERION-REFERENCED MEASURE

C6.2 Given five class assignments--three written and two oral--correctly use legal and Latin terms in completing the assignments. Written assignments must contain no more than two errors; oral assignments, no more than one.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have students maintain a notebook of legal and Latin terms and their definitions (E6.2.2).

2. Give a spelling test of legal and Latin terms (E6.2.2).

3. Design a practice sheet that contains the terms, with the letters of each scrambled. Have students arrange the letters in proper order to form each word (E6.2.2).

4. Design a word game, using legal and Latin terms and their definitions (E6.2.1).

SELECTED TOOLS AND MATERIALS

Vocabulary notebooks
Practice sheets containing scrambled letters
Word game
Chalkboard

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
10,000 Legal Words: Spelled and Divided for Quick Reference. Kurtz, Adams, and Vezeau.

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.3 Transcribe recorded letters and documents

COURSE

Legal Office Procedures (VA #6735)

6.3

PERFORMANCE OBJECTIVE

P6.3 Given recorded material, transcribe one mailable letter and one legal document of average length. Any errors must be neatly corrected.

SELECTED ENABLING OBJECTIVES

E6.3.1 Listen to recorded material to determine corrections in dictation noted by dictator.

E6.3.2 Listen to a portion of the recorded dictation and transcribe at typewriter.

E6.3.3 If dictation is unclear, back up and replay it.

E6.3.4 Typewrite dictation, using designated letter style and placement for legal document.

E6.3.5 Use correct spelling, punctuation, and word division.

E6.3.6 Listen to another portion of the recorded dictation and transcribe at typewriter.

E6.3.7 Replay dictation until clear, if necessary.

E6.3.8 After all dictation has been typewritten, proofread and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C6.3 Transcribe, from recorded material, one mailable letter and one legal document of average length. Any errors must be neatly corrected.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Review procedures for use of transcription equipment, and discuss criteria for a mailable letter or an acceptable legal document (E6.3.4, E6.3.5).

2. Prepare a bulletin board display of model letters and documents (E6.3.1-E6.3.8).

3. Have students practice transcribing legal correspondence and documents from recorded media (E6.3.1-E6.3.8).

4. Have students evaluate material typed by others, identifying any inaccuracies or noticeable corrections (E6.3.8).

SELECTED TOOLS AND MATERIALS

Bulletin board
Model letters and documents

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.4 Transcribe letters from recorded dictation at typewriter

COURSE

Legal Office Procedures (VA #6735)

6.4

PERFORMANCE OBJECTIVE

P6.4 Given dictation, transcribe three short letters at the typewriter. Information must be 100 percent accurate, any errors must be neatly corrected, and letters must meet the criteria for mailability.

SELECTED ENABLING OBJECTIVES

E6.4.1 Assemble carbon pack (if carbons are used) and insert in typewriter.

E6.4.2 Align paper in typewriter for proper spacing.

E6.4.3 Listen to dictation and typewrite what is being dictated.

E6.4.4 Stop dictator if material is unclear and have it repeated.

E6.4.5 After all material is typed, proofread for errors.

E6.4.6 Neatly correct any errors.

CRITERION-REFERENCED MEASURE

C6.4 Transcribe three short letters at the typewriter. Information must be 100 percent accurate, after any errors have been neatly corrected. These letters must meet the criteria for mailability.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Build students' skills in transcribing dictation given at typewriter by periodically dictating 5 to 10 short sentences to be transcribed while dictated (E6.4.1-E6.4.6).

2. Give students oral dictation of short letters and have them practice transcribing as letters are dictated (E6.4.1-E6.4.6).

3. Discuss major problems students encounter when transcribing from dictation given at typewriter (E6.4.1-E6.4.6).

4. Have students transcribe short letters dictated by other students (E6.4.1-E6.4.6).

SELECTED TOOLS AND MATERIALS

None identified

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.5 Prepare typewritten legal documents dictated from unfamiliar materials that contain legal/Latin terminology

COURSE

Legal Office Procedures (VA #6735)

6.5

PERFORMANCE OBJECTIVE

P6.5 Given two legal documents dictated at 80 words per minute from unfamiliar materials that contain legal/Latin terminology, transcribe documents in mailable form at a production rate acceptable for employment.

SELECTED ENABLING OBJECTIVES

E6.5.1 Read shorthand notes for meaning, inserting appropriate punctuation.

E6.5.2 Use designated style for legal documents being transcribed.

E6.5.3 Transcribe at top rate, using correct spelling and word division.

E6.5.4 Proofread for errors and neatly make corrections.

CRITERION-REFERENCED MEASURE

C6.5 Transcribe in mailable form two legal documents dictated at 80 words per minute from unfamiliar materials that contain legal/Latin terminology. Production rate must be acceptable for employment.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Give students practice at taking dictation by dictating at varying speeds from practiced and unfamiliar materials (E6.5.1-E6.5.4).

2. Give spelling check-ups on legal and Latin terminology (E6.5.3).

3. Review designated style for legal documents being transcribed (E6.5.2).

4. Review procedures for making acceptable corrections (E6.5.4).

5. Use transparencies to illustrate correct use of punctuation, word-division, capitalization, and other rules (E6.5.1-E6.5.4).

6. Have students typewrite legal documents from dictation. Transcription must be mailable and produced at an acceptable rate for employment (E6.5.1-E6.5.4).

SELECTED TOOLS AND MATERIALS

Spelling check-up tests
Practice sheets
Overhead projector

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating correct use of punctuation, word-division, capitalization, and other rules

SELECTED REFERENCES

Dictation Material for Beginning Shorthand. Gallion and Minnick.
10,000 Legal Words: Spelled and Divided for Quick Reference. Kurtz, Adams, and Vezeau.
Speed Dictation with Previews in Gregg Shorthand, Series 90. Leslie, Zoubek, and Condon.

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.6 Prepare typewritten legal documents taken from office-style dictation that contains legal/Latin terminology

COURSE

Legal Office Procedures (VA #6735)

6.6

PERFORMANCE OBJECTIVE

P6.6 Given office-style dictation that contains legal/Latin terminology, transcribe two legal documents. Documents must be produced at an acceptable rate for employment and must be in mailable form.

SELECTED ENABLING OBJECTIVES

E6.6.1 Read shorthand notes for meaning and insert appropriate punctuation.

E6.6.2 Use designated style for legal documents being transcribed.

E6.6.3 Transcribe at top rate, using correct spelling and word division.

E6.6.4 Proofread for errors and neatly make corrections.

CRITERION-REFERENCED MEASURE

C6.6 Transcribe two legal documents from office-style dictation that contains legal/Latin terminology. Production rate must be acceptable for employment and final documents must be in mailable form.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Give students practice in taking dictation by dictating material at varying speeds (E6.6.1-E6.6.4).

2. Have students read dictated material aloud for corrections in notes (E6.6.1, E6.6.2).

3. Demonstrate how to make corrections, insertions, or special notations during pauses in dictation (E6.6.1-E6.6.3).

4. Dictate legal documents, using office-style dictation, and have students practice transcribing at a production rate suitable for employment (E6.6.1-E6.6.4).

5. Have students exchange papers and note any inaccuracies in spelling, word division, or typing. The papers should then be returned to the original transcriber to be retyped or corrected (E6.6.4).

SELECTED TOOLS AND MATERIALS

Practice sheets

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

"An Intensive Approach to the Teaching of Punctuation in Shorthand and Transcription Classes," Journal of Business Education.

"Typewritten Transcription--A Component of Shorthand Instruction," Shorthand--Perspective, Opinion, and Dialogue. Delta Pi Epsilon.

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.7 Edit and revise legal correspondence for accuracy of content, clarity of expression, and appropriatness of style

COURSE

Legal Office Procedures (VA #6735)

6.7

PERFORMANCE OBJECTIVE

P6.7 Given three typewritten, rough-draft pieces of legal correspondence and appropriate source materials, edit and revise the correspondence for accuracy of content, clarity of expression, and appropriateness of style. Typewrite the edited correspondence so that it meets criteria for mailability.

SELECTED ENABLING OBJECTIVES

E6.7.1 Read correspondence and verify factual accuracy by comparing to source information.

E6.7.2 Rewrite and edit sentences that are unclear or expressed in an awkward manner, using proofreader's marks as appropriate.

E6.7.3 Check correspondence for correct legal spacing and punctuation.

E6.7.4 Typewrite correspondence in correct format.

E6.7.5 Proofread work for accuracy and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C6.7 Edit and revise three typewritten, rough-draft pieces of legal correspondence for accuracy of content, clarity of expression, and appropriateness of style. Typewrite the edited correspondence so that it meets criteria for mailability.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students the importance of preparing legal correspondence that is accurate, clear, and in the appropriate style (E6.7.1-E6.7.5).

2. Distribute practice sheets that contain two sets of information that should match, but contain errors. Have students verify accuracy of material and locate and correct any errors (E6.7.1-E6.7.5).

3. Use transparencies to illustrate proofreader's marks and discuss with students what the marks mean (E6.7.2).

4. On the chalkboard, write sentences that are unclear or expressed in an awkward manner, and have students suggest how sentences could be rewritten (E6.7.2).

5. Distribute copies of correspondence that contains unclear sentences, incorrect information, or inappropriate format. Have students edit and revise the correspondence (E6.7.1-E6.7.5).

SELECTED TOOLS AND MATERIALS

Practice sheets
Overhead projector
Copies of correspondence
Chalkboard

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating proofreader's marks

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.8 Compose and prepare simple business correspondence

COURSE

Legal Office Procedures (VA #6735)

6.8

PERFORMANCE OBJECTIVE

P6.8 Given appropriate information, compose and prepare a memorandum and a simple business letter to a client for the purpose of setting up an appointment. An acceptable rating must be received on items of the attached checklist.

SELECTED ENABLING OBJECTIVES

E6.8.1 Compile client information or other appropriate information.

E6.8.2 Prepare letter and memorandum in style designated by attorney or supervisor.

E6.8.3 Include the following in the appointment letter:
- a. date and time of appointment,
- b. place of appointment,
- c. name of attorney with whom the appointment is scheduled,
- d. purpose of appointment.

E6.8.4 Space properly on page.

E6.8.5 Use correct spelling, punctuation, and word division.

E6.8.6 Proofread and neatly correct any errors.

CRITERION-REFERENCED MEASURE

C6.8 Compose and prepare a simple business letter and a memorandum. An acceptable rating must be received on items of the attached checklist.

COMPOSING AND PREPARING SIMPLE BUSINESS CORRESPONDENCE

CHECKLIST

(6.8)

	YES	NO
1. Letter or memorandum is clear, simple, and concise.	____	____
2. Letter or memorandum is in style designated by attorney or supervisor.	____	____
3. Letter or memorandum is placed properly on page.	____	____
4. Appointment letter includes necessary information.	____	____
5. Letter is addressed according to proper title.	____	____
6. Spelling, punctuation, and word division are correct.	____	____
7. Any errors have been neatly corrected.	____	____

SELECTED INSTRUCTIONAL ACTIVITIES

1. Review with students information that should be included in an appointment letter and basic rules for composing business letters and memorandums (E6.8.1-E6.8.6).
2. Use transparencies to illustrate sample letters and memorandums. Have students decide which correspondence is satisfactory and suggest ways the unsatisfactory correspondence could be appropriately rewritten (E6.8.2-E6.8.5).
3. Give students appropriate source material and have them compose appointment letters and memorandums. Have students exchange papers and mark any spelling or typographical errors and unclear sentences (E6.8.1-E6.8.6).
4. Have students work together to compose letters and memorandums they think would be appropriate for given situations in legal offices. Discuss strengths and weaknesses of the letters (E6.8.1-E6.8.5).
5. Have students evaluate letters and memorandums prepared by others, using a checklist (E6.8.6).

SELECTED TOOLS AND MATERIALS

Overhead projector

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating sample letter and memorandum

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.
The Legal Secretary: An Office Job Simulation. McIntosh and Welter.

Application

DUTY AREA

6. PROCESSING LETTERS AND DOCUMENTS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

6.9 Operate text-editing equipment to record, edit, and play back legal correspondence

COURSE

Legal Office Procedures (VA #6735)

6.9

PERFORMANCE OBJECTIVE

P6.9 Given appropriate correspondence, correctly operate text-editing equipment to record, edit, and play back three pieces of mailable legal correspondence.

SELECTED ENABLING OBJECTIVES

E6.9.1 Typewrite correspondence on equipment.

E6.9.2 Proofread.

E6.9.3 Insert new information according to procedures appropriate for text-editing or word processing equipment.

E6.9.4 Code documents.

E6.9.5 Store and replay when needed.

CRITERION-REFERENCED MEASURE

C6.9 Correctly operate text-editing equipment to record, edit, and play back three pieces of mailable legal correspondence.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students ways that text-editing equipment can increase efficiency in a legal office (E6.9.3-E6.9.5).

2. Review steps to follow in operating text-editing equipment (E6.9.1-E6.9.5).

3. Distribute correspondence and have students practice typewriting it on text-editing equipment, revising the correspondence as needed and playing it back (E6.9.1-E6.9.5).

4. Have students compare procedures they use when operating text-editing equipment with those used when preparing correspondence at typewriter. Ask them to identify advantages and disadvantages encountered with both types of equipment (E6.9.1-E6.9.5).

SELECTED TOOLS AND MATERIALS

Correspondence
Text-editing equipment

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

None identified

DUTY AREA

7. OBSERVING LEGAL OFFICE ETHICS

TASKS/COMPETENCIES

7.1 Identify procedures for maintaining confidentiality of client information

7.2 Identify procedures for professional handling of client complaints

Application

DUTY AREA

7. OBSERVING LECAL OFFICE ETHICS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

7.1 Identify procedures for maintaining confidentiality of client information

COURSE

Legal Office Procedures (VA #6735)

7.1

PERFORMANCE OBJECTIVE

P7.1 Given three simulated office situations, accurately respond so that client information remains confidential.

SELECTED ENABLING OBJECTIVES

E7.1.1 Give client information only to attorney and other appropriate personnel, or file in client folder.

E7.1.2 Do not leave client information in a place where it can be read by unauthorized personnel.

E7.1.3 If questioned by phone or in person, do not divulge any information, even to client, without authorization from attorney or appropriate personnel.

E7.1.4 Do not discuss client information with other staff members, unless authorized to do so.

CRITERION-REFERENCED MEASURE

C7.1 In three simulated situations, accurately respond so that client information remains confidential.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss with students why confidentiality of client information is important (E7.1.1-E7.1.4).

2. On the chalkboard, list problems that could occur if confidentiality of client information is not observed (E7.1.1-E7.1.4).

3. Distribute case studies involving problems in confidentiality. Have students suggest ways the situations might have been more appropriately handled (E7.1.1-E7.1.4).

4. Role play situations where requests are made for information that must remain confidential (E7.1.1-E7.1.4).

SELECTED TOOLS AND MATERIALS

Chalkboard
Case studies

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

7. OBSERVING LEGAL OFFICE ETHICS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

7.2 Identify procedures for professional handling of client complaints

COURSE

Legal Office Procedures (VA #6735)

7.2

PERFORMANCE OBJECTIVE

P7.2 Given a simulated office situation in which a client is displeased with legal procedures, identify means of handling client complaints professionally.

SELECTED ENABLING OBJECTIVES

E7.2.1 Listen politely to client's complaint, but do not respond.

E7.2.2 If possible, change topic of conversation.

E7.2.3 Refrain from giving opinion about attorney, either personal or professional.

E7.2.4 Resolve any differences with attorney in private, not where clients can overhear.

CRITERION-REFERENCED MEASURE

C7.2 In a simulated office situation in which a client is displeased with legal procedures, identify means of handling client complaints professionally.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss problems that might occur if legal office employees criticize attorneys when talking with clients (E7.2.1-E7.2.3).

2. Have students suggest ways to handle a complaining client tactfully E7.2.1-E7.2.3).

3. Distribute case studies that involve criticism of attorneys by clients and legal office employees, and have students suggest how the situation might have been appropriately handled (E7.2.1-E7.2.4).

4. Have students role play situations where complaining clients are handled appropriately (E7.2.1-E7.2.3).

SELECTED TOOLS AND MATERIALS

Case studies

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.

DUTY AREA

8. SEEKING EMPLOYMENT

TASKS/COMPETENCIES

8.1 List sources of information about employment opportunities

8.2 Identify procedures in preparing for a job interview

8.3 Prepare a typewritten resume

Application

DUTY AREA

8. SEEKING EMPLOYMENT

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

8.1 List sources of information about employment opportunities

COURSE

Legal Office Procedures (VA #6735)

8.1

PERFORMANCE OBJECTIVE

P8.1 Given appropriate resources and information, accurately list five sources of information for employment opportunities.

SELECTED ENABLING OBJECTIVES

E8.1.1 Determine type of position desired and legal specialty involved.

E8.1.2 Identify sources of information about desired position, including:
- a. Dictionary of Occupational Titles,
- b. Occupational Outlook Handbook,
- c. Employment Commission,
- d. guidance counselors,
- e. newspapers.

E8.1.3 Make a list of appropriate sources of information for desired employment.

CRITERION-REFERENCED MEASURE

C8.1 Accurately list five sources of information for employment opportunities.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss sources of jobs, including friends, employment agencies, want ads, counselors, teachers, radio, telephone directory, and personal inquiries (E8.1.1-E8.1.3).

2. Have students bring in newspaper want ads. Discuss information in ads. including abbreviations and job qualifications, duties, hours, and location (E8.1.2).

3. Secure copies of pages related to legal office occupation from the Dictionary of Occupational Titles and the Occupation Outlook Handbook, and review the information with students (E8.1.1).

4. Have students role play requesting an interview on the telephone, in response to a want ad. Ask the class to identify strengths and weaknesses of the perspective applicant (E8.1.1-E8.1.3).

5. Prepare a bulletin board containing information about legal job opportunities. Include want ads, job bulletins, articles about jobs, skills required on the job, and other pertinent information (E8.1.1-E8.1.3).

6. Have a representative from the Virginia Employment Commission speak with the class about using its services (E8.1.2, E8.1.3).

SELECTED TOOLS AND MATERIALS

Newspaper ads
Duplicated pages from the DOT and OOH
Bulletin board and information about legal job opportunities

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Getting a Job. Zedlitz.
Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

8. SEEKING EMPLOYMENT

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

8.2 Identify procedures in preparing for a job interview

COURSE

Legal Office Procedures (VA #6735)

8.2

PERFORMANCE OBJECTIVE

P8.2 Given a simulated job lead, prepare for a job interview by becoming acquainted with the legal specialty, preparing information about job competencies, and demonstrating appropriate appearance and personal conduct.

SELECTED ENABLING OBJECTIVES

E8.2.1 Investigate the legal specialty of prospective employer.

E8.2.2 Prepare information about competencies involved in prospective job.

E8.2.3 Compare personal qualifications to specific job competencies.

E8.2.4 Plan attire suitable for job interview.

E8.2.5 Research and prepare a list of "do's and don'ts" for personal conduct during an interview.

E8.2.6 Demonstrate knowledge of appropriate job interview conduct during a simulated interview.

CRITERION-REFERENCED MEASURE

C8.2 Prepare for a job interview by becoming acquainted with the legal specialty, preparing information about job competencies, and demonstrating appropriate appearance and personal conduct.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have selected students use library resources to research different legal specialties and report findings to the class (E8.2.1).

2. Have student suggest competencies that would be appropriate for a position in a legal office (E8.2.2).

3. Have students prepare a bulletin board of "do's and don'ts" for personal conduct and appearance during interview (E8.2.4-E8.2.6).

4. Show the film Interview--Ready or Not, and discuss (E8.2.1-E8.2.6).

5. Work with students to prepare a checklist that can be used to evaluate an interviewee's performance during an interview (E8.2.1-E8.2.6).

6. Organize students into small groups and have them role play an interview situation, using a checklist to evaluate the interviewee's performance (E8.2.1-E8.2.6).

7. Have appropriate individuals from the business community or the school administration conduct mock interviews with the students. Ask the interviewers to discuss with the students strengths and weaknesses displayed during the interviews (E8.2.1-E8.2.6).

SELECTED TOOLS AND MATERIALS

Chalkboard
Bulletin board and art supplies
Film
Film projector

SELECTED AUDIOVISUAL MATERIALS

Film: Interview--Ready or Not, Film No. 07312. Audiovisual Services, State Department of Education.

SELECTED REFERENCES

Getting a Job. Zedlitz.
Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

Application

DUTY AREA

8. SEEKING EMPLOYMENT

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

8.3 Prepare a typewritten resume

COURSE

Legal Office Procedures
(VA #6735)

8.3

PERFORMANCE OBJECTIVE

P8.3 Given appropriate instruction and materials, typewrite a personal resume in an appropriate format. Any corrections in the typewritten resume must not be noticeably visible.

SELECTED ENABLING OBJECTIVES

E8.3.1 Compile information.

E8.3.2 Typewrite resume in an appropriate format, including:

a. job or career objective;
b. personal data (name, address, telephone number, social security number);
c. educational history (names and addresses of schools attended, degrees or certificates received, dates of attendance and graduation);
d. job experience (all jobs including summer employment, names and addresses of employers, dates of employment);
e. special interests (volunteer work in church or community, hobbies that relate to work, extracurricular activities);
f. references (names, addresses, and telephone numbers of at least three people who are not relatives and who have given permission to be listed as references).

E8.3.3 Check work for incorrect spellings or typographical errors.

E8.3.4 Neatly correct any errors.

CRITERION-REFERENCED MEASURE

C8.3 Typewrite a personal resume in an appropriate format, making sure that any corrections made are not noticeably visible.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss the use and importance of a resume in seeking employment (E8.3.1-E8.3.4).

2. Have students design a poster that illustrates types of information included on a resume (E8.3.2).

3. Use transparencies to illustrate steps to follow in typewriting a resume and the appropriate wording for included information (E8.3.1-E8.3.4).

4. Have students list information about themselves that they can include in personal resumes (E8.3.2).

5. Have students evaluate information they have listed as to appropriateness for inclusion on a resume. Have them organize the appropriate information as it would appear on a resume (E8.3.2).

6. Have students prepare initial typewritten drafts of resumes and provide input prior to their preparation of final resumes (E8.3.1, E8.3.2).

7. Have each student prepare a resume in final form that can be used for job-seeking purposes (E8.3.2-E8.3.4).

SELECTED TOOLS AND MATERIALS

Posterboard and art supplies
Overhead projector

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps to follow in typewriting a resume

SELECTED REFERENCES

Getting a Job. Zedlitz.
Legal Office Procedures, 2nd edition. Bate and Casey.
Legal Office Procedures, Instructor's Manual, 2nd edition. Bate and Casey.

DUTY AREA

9. DEVELOPING PERSONAL EMPLOYABILITY SKILLS

TASKS/COMPETENCIES

9.1 Participate in Future Business Leaders of America activities

9.2 Use constructive criticism to develop plans for improving personal work habits

9.3 Identify the attitudes and work habits necessary for good staff relations in a legal office

9.4 Identify procedures and considerations for producing work of satisfactory quality

9.5 List considerations for maintaining an orderly office and reception area

9.6 Define appropriate grooming and dress practices for working in a legal office

Application

DUTY AREA

9. DEVELOPING PERSONAL EMPLOYABILITY SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK/COMPETENCY

9.1 Participate in Future Business Leaders of America activities

COURSE

Legal Office Procedures (VA #6735)

9.1

PERFORMANCE OBJECTIVE

P9.1 Given five in-class activity areas of the Future Business Leaders of America, participate in one activity per area according to FBLA guidelines.

SELECTED ENABLING OBJECTIVES

E9.1.1 Define the purposes of the Future Business Leaders of America.

E9.1.2 Engage in organization activities, demonstrating the ability to actively participate.

E9.1.3 Participate in completing individual and group projects at a level of performance which reflects pride in accomplishment.

E9.1.4 Prepare for and participate in regional and state contests and meetings.

CRITERION-REFERENCED MEASURE

C9.1 Participate in one in-class activity selected from each of five FBLA activity areas according to the organization's guidelines.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have students construct a bulletin board which displays the purposes of the FBLA and five activity areas involved in the organization (E9.1.1, E9.1.2).
2. Post a program of work and a calendar for the local FBLA chapter. Discuss these periodically with the students (E9.1.2-E9.1.4).
3. Periodically schedule FBLA activities that involve all students. Have students volunteer for various committees that will carry out the activities (E9.1.3).
4. Encourage students, according to their special abilities, to participate in local, regional, and state FBLA contests (E9.1.4).
5. Discuss with students strengths that can be developed through participation in FBLA activities and how these strengths relate to employability potential (E9.1.1).
6. Have each student compose and typewrite a short paper of two or three paragraphs on the topic of "What FBLA Means to Me" (E9.1.1).

SELECTED TOOLS AND MATERIALS

Bulletin board
FBLA program of work and calendar

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

FBLA Co-Curricular Activities. Division of Vocational Education, Department of Education.
Guide for Integrating FBLA Into the Classroom. Division of Program Services, Department of Education.
Virginia Chapter Future Business Leaders of America Handbook. Division of Program Services, Department of Education.

Application

DUTY AREA

9. DEVELOPING PERSONAL EMPLOYABILITY SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK/COMPETENCY

9.2 Use constructive criticism to develop plans for improving personal work habits

COURSE

Legal Office Procedures (VA #6735)

9.2

PERFORMANCE OBJECTIVE

P9.2 Given an analysis of personal work habits, use this constructive criticism to develop a plan for improving any identified weaknesses in this area by completing an instructor-prepared worksheet. Plan for self-improvement will not be graded, but all items on the worksheet must be completed.

SELECTED ENABLING OBJECTIVES

E9.2.1 Determine positive work habits, including excercising self-control, accepting criticism courteously, not arguing with those offering criticism, and not taking criticism personally.

E9.2.2 Analyze personal weaknesses.

E9.2.3 Develop a plan for improving personal weaknesses.

CRITERION-REFERENCED MEASURE

C9.2 Develop a plan for improving personal work habits by completing an instructor-prepared worksheet. Plan will not be graded, but all items on the worksheet must be completed.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss criticism, differentiating between constructive and destructive criticism (E9.2.1-E9.2.3).

2. Have students role play situations in which criticism is given and have them analyze reactions of the recipients of the criticism (E9.2.1).

3. Have students identify benefits of accepting constructive criticism in a positive manner (E9.2.2).

4. Have students identify personal characteristics that will help them accept criticism in a positive manner (E9.2.1-E9.2.3).

SELECTED TOOLS AND MATERIALS

None identified

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Your Attitude is Showing. Chapman.

Application

DUTY AREA

9. DEVELOPING PERSONAL EMPLOYABILITY SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

9.3 Identify the attitudes and work habits necessary for good staff relations in a legal office

COURSE

Legal Office Procedures (VA #6735)

9.3

PERFORMANCE OBJECTIVE

P9.3 Given a description of a simulated legal office setting, identify the attitudes and work habits necessary for a positive office environment.

SELECTED ENABLING OBJECTIVES

E9.3.1 Be cheerful and positive about client and office duties.

E9.3.2 Accept fair share of responsibilities.

E9.3.3 Handle details in a thorough, pleasant, and accurate manner.

E9.3.4 Maintain a positive outlook when working under pressure.

E9.3.5 Seek ways to relieve attorney and other legal personnel of time-consuming tasks.

CRITERION-REFERENCED MEASURE

C9.3 Identify the attitudes and work habits necessary for a positive working environment in a legal office.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Show the film, Office Practice--Working with Others, and discuss film with class (E9.3.1-E9.3.5).

2. Establish situations where students are pressured to meet deadlines and evaluate their attitudes toward their work and others in such situations (E9.3.4).

3. Assign projects to be completed by groups of students. After the projects are completed, have students evaluate how their attitudes affected progress toward completion of the projects (E9.3.2-E9.3.4).

4. Assign individual students to work with other members of the class with whom they have difficult relationships. Ask students to identify attitudes they have displayed that have created conflict (E9.3.2-E9.3.5).

5. Have students role play work situations in a legal office and discuss attitudes necessary to make the office a positive environment (E9.3.1-E9.3.5).

SELECTED TOOLS AND MATERIALS

Film
Film projector

SELECTED AUDIOVISUAL MATERIALS

Film: Office Practice--Working with Others, Film No. 33409. Audiovisual Services, State Department of Education.

SELECTED REFERENCES

None identified

Application

DUTY AREA

9. DEVELOPING PERSONAL EMPLOYABILITY SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

9.4 Identify procedures and considerations for producing work of satisfactory quality

COURSE

Legal Office Procedures (VA #6735)

9.4

PERFORMANCE OBJECTIVE

P9.4 Given simulated legal office assignments, identify procedures and considerations for completion of assignments in a satisfactory manner. Identifications must match those included on a class-developed master list.

SELECTED ENABLING OBJECTIVES

E9.4.1 Prioritize work according to due dates.

E9.4.2 Perform work according to a logical sequence of tasks.

E9.4.3 Schedule adequate time to complete each task.

E9.4.4 Check accuracy of work while completing task.

E9.4.5 Evaluate work for accuracy and completeness.

CRITERION-REFERENCED MEASURE

C9.4 Identify procedures and considerations for completion of work assignments in a satisfactory manner. Identifications must match those included on a class-developed master list.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss why it is important to produce work of satisfactory quality (E9.4.1-E9.4.5).

2. Have students identify characteristics of good quality work (E9.4.1-E9.4.5).

3. Prepare a checklist of quality work characteristics identified by students and use to evaluate the quality of work they complete (E9.4.1-E9.4.5).

4. Have students use the checklist to evaluate work they have produced (E9.4.5).

5. Discuss situation analyses where workers produce work that is of poor quality and have students suggest ways in which the outcomes could have been different (E9.4.1-E9.4.5).

SELECTED TOOLS AND MATERIALS

Checklist of characteristics
Case studies

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

None identified

Application

DUTY AREA

9. DEVELOPING PERSONAL EMPLOYABILITY SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK / COMPETENCY

9.5 List considerations for maintaining an orderly office and reception area

COURSE

Legal Office Procedures (VA #6735)

9.5

PERFORMANCE OBJECTIVE

P9.5 Given a simulated office setting and office schedule for the day, identify considerations for maintaining an orderly office and reception area with 100 percent accuracy on instructor-prepared worksheet.

SELECTED ENABLING OBJECTIVES

E9.5.1 Identify materials needed by the employer (attorney) for scheduled meetings with clients.

E9.5.2 Explain the characteristics of a neat and orderly work area.

E9.5.3 Explain the characteristics of a neat and orderly reception area.

CRITERION-REFERENCED MEASURE

C9.5 Identify considerations for maintaining an orderly office and reception area with 100 percent accuracy on instructor-prepared worksheet.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss atmospheres of waiting rooms and ask students to recall details of different waiting rooms they have seen (E9.5.3).

2. Have pictures or diagrams depicting office and reception areas that are not neat and orderly. Have students identify how they would improve the areas (E9.5.1-E9.5.3).

3. On the chalkboard, list procedures to follow in maintaining an orderly office and reception area (E9.5.1-E9.5.3).

4. Have students prepare a checklist that can be used to evaluate characteristics of a neat and orderly work area. Periodically ask them to use the checklist to evaluate their own work areas (E9.5.1, E9.5.2).

SELECTED TOOLS AND MATERIALS

Pictures or diagrams of disorderly office and reception areas
Instructor-prepared worksheet

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.

Application

DUTY AREA

9. DEVELOPING PERSONAL EMPLOYABILITY SKILLS

PROGRAM

SECRETARIAL, WORD PROCESSING, AND ADMINISTRATIVE SUPPORT (07.0601)

TASK/COMPETENCY

9.6 Define appropriate grooming and dress practices for working in a legal office

COURSE

Legal Office Procedures (VA #6735)

9.6

PERFORMANCE OBJECTIVE

P9.6 Given three simulated working days, exhibit grooming and attire appropriate for a legal office. An acceptable rating must be received on items of a checklist supplied by the instructor.

SELECTED ENABLING OBJECTIVES

E9.6.1 Identify rules related to good personal hygiene.

E9.6.2 Identify characteristics of proper legal office attire.

E9.6.3 Distinguish between hair and clothing styles which are appropriate in an office setting and those which are not.

E9.6.4 Explain the importance of moderate use of cosmetics and accessories.

CRITERION-REFERENCED MEASURE

C9.6 Exhibit good grooming and appropriate attire for working in a legal office. An acceptable rating must be received on a checklist supplied by the instructor.

SELECTED INSTRUCTIONAL ACTIVITIES

1. On the chalkboard, list basic grooming rules and discuss the rules with the class (E9.6.1-E9.6.4).
2. Have several students bring in pictures from ads or fashion magazines that illustrate proper attire for a legal office (E9.6.2-E9.6.4).
3. Have students design a poster showing proper and improper ways to dress in a legal office (E9.6.2-E9.6.4).
4. Designate a specific day each month when students come to class dressed and groomed as they would be for working in a legal office (E9.6.1-E9.6.4).
5. Have students prepare a checklist that can be used to evaluate appropriate grooming and attire for a legal office. Ask them to use the checklist on days that they come attired for working in a legal office (E9.6.1-E9.6.4).
6. Invite a representative from a local business college to speak on the topic of dressing for success (E9.6.1-E9.6.4).

SELECTED TOOLS AND MATERIALS

Chalkboard
Pictures from ads or fashion magazines
Posterboard and art supplies

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Legal Office Procedures, 2nd edition. Bate and Casey.

SECTION 2.

PROGRAMS AND COURSES

The occupational preparation programs in Business Education are job-cluster oriented. The instructional emphasis is placed on meeting the occupational objectives of the individual student. The student may pursue study through available options within any of the following four major programs:

Accounting and Computing Occupations
Business Data Processing Occupations
General Office and Administrative Support Occupations
Secretarial, Word Processing, and Administrative Support Occupations

Legal Office Procedures may be chosen to meet the requirements for Option I in the Secretarial, Word Processing, and Administrative Support Occupations Program. Included in the first part of this section is a description of that program, a listing of program courses and options, and DOT job codes and titles related to the program.

Included in the second part of this section is a description of the Legal Office Procedures course. The course is approved by the Virginia Department of Education and is based on the task inventory presented in the previous guide section. The "Task/Competency Sequence" lists the tasks of that section in suggested instructional order for the course. The course outline has been cross-referenced with the task inventory sheets to assist the instructor in identifying instructional objectives, materials, criterion standards, and reference materials.

SECONDARY PROGRAMS AND COURSES

PROGRAM TITLE: Secretarial, Word Processing, and Administrative Support Occupations

DESCRIPTION: Students who complete this program are prepared for entry into secretarial, word processing, and administrative support occupations. They learn to process correspondence, prepare business reports, manage administrative details, and handle basic office procedures.

CIP CODE: 07.0601

SUGGESTED GRADE LEVEL: 8 - 12

APPROVED COURSE	VA COURSE CODE
Business Exploration	6109
Introduction to Business	6110
Typewriting	6151
Shorthand	6211
Secretarial Administration I	6250
Secretarial Administration II	6260
Office Simulation	6440
Office Technology I	6620
Office Technology II	6621
Word Processing	6625
Medical Office Procedures	6730
Legal Office Procedures	6735

Program Options:

Option 1:	6109, 6110, 6151, 6250, 6260 or 6730 or 6735
Option 2:	6109, 6110, 6151, 6620, 6625
Option 3:	6109, 6110, 6151, 6620, 6621 or 6440, 6625
Option 4:	6109, 6110, 6151, 6211, 6620, 6621 or 6440, 6625
Option 5:	6109, 6110, 6151, 6211, 6620, 6625
COE:	6250, 6620, 6621, 6625

OCCUPATIONAL LEVEL	DOT CODE	DOT TITLE
Entry:	201.362-010	Legal Secretary (Option 1 only)
	201.362-014	Medical Secretary (Option 1 only)
	201.362-030	Secretary (General)
	202.362-014	Stenographer (Options 1, 4, and 5 only)
	203.362-018	Terminal System Operator
	203.582-034	Magnetic-Tape-Typewriter Operator
	203.582-058	Transcribing-Machine Operator
	219.362-010	Administrative Clerk
Advanced:	169.167-014	Administrative Secretary
	203.137-010	Word Processing Supervisor

LEGAL OFFICE PROCEDURES (6735)

Description and Sequence

Course Description: Legal Office Procedures is a one-year, double-period occupational preparation course offered at the twelfth-grade level. Students develop skills in typewriting, communications, office machines operations, and records management, as applied in a legal environment. Shorthand and transcription skills from Secretarial Administration I are further developed, with emphasis on legal terminology and its use in the preparation of legal documents. The course helps students develop personal employability skills and prepares them for employment in a variety of legal office settings.

Prerequisites: Secretarial Administration I

Suggested Grade Level: 12

*Secretarial Administration I is also a one-year, double-period occupational preparation course. It is offered at the eleventh-grade level, and students entering it have completed Typewriting and Introduction to Business, single-period offerings at the ninth- and tenth-grade levels. Task/competencies in the following list include those for Secretarial Administration I and Legal Office Procedures. Task/competencies related to the former are preceded by an asterisk (*); those related to the latter are preceded by a task/competency number.

Task/Competency Sequence

* Exhibit self control, persistence, and initiative in completing tasks on time
* Exhibit traits associated with responsibility, such as productive use of time and economical use of supplies
* Evaluate personal work habits and attitudes
* Maintain regular and prompt attendance
* Follow oral or written instructions in the completion of tasks
* Exhibit good grooming and appropriate attire for working
* Keep the area in and around the work station uncluttered
* Assemble supplies and information necessary to complete assigned tasks
* Plan work efficiently, in order to meet deadlines
9.1 Participate in Future Business Leaders of America activities
9.2 Use constructive criticism to develop plans for improving personal work habits
9.3 Identify the work habits and attitudes necessary for good staff relations in a legal office
9.4 Identify procedures and considerations for producing work of satisfactory quality

9.5 List considerations for maintaining an orderly office and reception area
9.6 Define appropriate grooming and dress practices for working in a legal office
6.2 Use correct legal and Latin terms as they occur in written and oral work
6.1 Find and correct spelling and word-division errors in legal documents
* Typewrite straight copy at a minimum rate, with an error tolerance acceptable for employment
* Typewrite addresses on ten envelopes at the rate of one per minute, with all errors corrected
* Typewrite routine information on three short preprinted forms, with all information appropriately spaced and aligned and all errors corrected
* Typewrite two short tables or statistical reports from handwritten or edited, rough-draft copy
* Typewrite a two-page manuscript with footnotes, a title page, and a bibliography from a handwritten or edited, rough-draft copy
* Typewrite five mailing or file folder labels in correct form, with all errors corrected
* Typewrite minutes of a meeting from handwritten copy
* Typewrite a speech from a handwritten or edited, rough-draft copy
4.1 Prepare mailable letters in legal format from handwritten, rough-draft copy and from dictation
4.2 Prepare mailable business letters with special features from handwritten, rough-draft copy and from dictation
4.3 Prepare a short memorandum in specified format from handwritten, rough-draft copy or from dictation
5.1 Typewrite an affidavit
5.2 Typewrite a legal document containing an acknowledgment
5.3 Typewrite a legal sales contract
5.4 Typewrite a deed on a printed form
5.5 Typewrite a power of attorney
5.6 Typewrite a special power of attorney
5.7 Typewrite a valid will
5.8 Typewrite codicils to a valid will
5.9 Typewrite legal documents from various specialized areas
5.10 Typewrite agreements, using legal cap and prepared forms
5.11 Typewrite complaints (Motions for Judgment) and summons, using legal caps and printed forms
5.12 Typewrite interrogatories on legal copy, using correct format and style
5.13 Typewrite depositions, using legal cap
5.14 Typewrite subpoenas, using printed forms
6.4 Transcribe letters from recorded dictation at typewriter
6.5 Prepare typewritten legal documents dictated from unfamiliar materials that contain legal/Latin terminology
6.6 Prepare typewritten legal documents from office-style dictation that contains legal/Latin terminology
6.3 Transcribe recorded letters and documents
* Retrieve five documents or items of information from files and provide written information when requested
* Change the ribbon, replace the paper tape, and make minor machine adjustments on calculators
* Clean keys or elements, remove dust, change ribbon, and make machine adjustments on typewriters

*	Open, stamp, sort, and route ten routine pieces of incoming mail
*	Prepare ten letters for mailing by verifying addresses and ZIP codes, checking for enclosures, folding, inserting into appropriate envelopes, sealing, and determining postage
2.1	File documents, using an alphanumeric filing system
2.2	File documents by subject
2.3	Maintain and use a tickler file
2.6	Maintain forms file
*	Prepare three legible deposit slips involving checks, currency, and coins
*	Operate ten-key calculating equipment by touch
1.1	Identify account situations that should be held in an escrow account
2.4	Prepare records for new clients
2.5	Update records for clients
*	Perform routine receptionist activities for five situations, including scheduling of appointments
*	Answer five routine calls and route to proper party, give nonconfidential information, and take clear message
*	Place one long distance and two local calls
3.1	Rearrange employer's (attorney's) calendar for appointment changes
3.2	Determine incoming calls that must be referred to attorney or supervisor
3.3	Prepare written telephone messages
3.4	Identify organizations and individuals that would be included in the legal secretary's personal directory
3.5	Prepare information needed by employer for use during client conference
6.9	Operate text-editing equipment to record, edit, and play back legal correspondence
6.7	Edit and revise legal correspondence for accuracy of content, clarity of expression, and appropriateness of style
6.8	Compose and typewrite simple business correspondence
*	Identify skills and personal traits, and match them with available job opportunities
*	Prepare typewritten application forms so that applicant is presented favorably
*	Compose and typewrite acceptable application letters
*	Demonstrate acceptable behavior during a simulated job interview
8.1	List sources of information about employment opportunities
8.3	Prepare a typewritten résumé
8.2	Identify procedures in preparing for a job interview
7.1	Identify procedures for maintaining confidentiality of client information
7.2	Identify procedures for professional handling of client complaints

LEGAL OFFICE PROCEDURES (6735)

Outline and Code

	Content Outline	Task/Competency Code
I.	Course Orientation	
II.	Developing Personal Employability Skills	
	A. Future Business Leaders of America Activities	P9.1
	B. Work Habits	P9.2, P9.6
III.	Using Legal Terminology	
	A. Definitions	P6.2
	B. Spelling and Word Division	P6.1
IV.	Typewriting	
	A. Legal Correspondence	P4.1, P4.3
	B. Legal Instruments	P5.1, P5.14
V.	Transcribing	
	A. Shorthand	P6.4 - P6.6
	B. Machine	P6.3
VI.	Filing	
	A. Systems	P2.1, P2.2
	B. Tickler File	P2.3
	C. Forms File	P2.6
VII.	Maintaining Client Records	P1.1, P2.4, P2.5
VIII.	Performing Receptionist Activities	
	A. Appointments	P3.1
	B. Telephone	P3.2, P3.3
	C. Personal Directory	P3.4
	D. Client Conference Information	P3.5
IX.	Processing Letters and Documents	
	A. Text-editing Equipment	P6.9
	B. Edit and Revision	P6.7
	C. Letter Composition	P6.8
X.	Seeking Employment	
	A. Job Information	P8.1
	B. Resume Preparation	P8.3
	C. Job Interview	P8.2
XI.	Observing Legal Office Ethics	P7.1, P7.2

APPENDIX

ADDITIONAL INFORMATION AND RESOURCES

Instructional resources, such as reference books, films, slides, transparencies, and periodicals, serve as valuable sources of information for the teacher and curriculum developer. These materials are useful in developing instructional materials and providing instructional activities.

This section includes a listing of reference materials that are useful in developing the competency-based instructional course materials for Legal Office Procedures.

TEXTBOOKS AND ACCOMPANYING MATERIALS

Adams and Kurtz. Legal Terminology and Transcription. Hightstown, NJ: Gregg Division/McGraw-Hill Book Company, 1981.

Adams and Kurtz. Legal Typing Practice. Hightstown, NJ: Gregg Division/ McGraw-Hill Book Company, 1981.

Bassett, Goodman, and Fosegan. Business Records Control, 5th edition. Cincinnati, OH: South-Western Publishing Company, 1980.

Bate and Casey. Legal Office Procedures, 2nd edition. Hightstown, NJ: Gregg Division/McGraw-Hill Book Company, 1981.

Bate and Casey. Legal Office Procedures, Instructor's Manual, 2nd edition. Hightstown, NJ: Gregg Division/McGraw Hill Book Company, 1981.

Baynes and Tower. Market Square Legal Center: A Legal Typing Simulation. Atlanta, GA: Houghton Mifflin Company, 1980.

Baynes and Tower. Market Square Legal Center: A Legal Typing Simulation, Teacher's Manual. Atlanta, GA: Houghton Mifflin Company, 1980.

Blackledge, Blackledge, and Keily. The Job You Want--How To Get It, 2nd edition. Cincinnati, OH: South-Western Publishing Company, 1980.

Chapman. Your Attitude Is Showing. Palo Alta, CA: Science Research Associates, Inc., 1977.

Churchack, Yengel, and Hannigan. Legal Typewriting, 2nd edition. Hightstown, NJ: Gregg Division/McGraw-Hill Book Company, 1981.

Conover, Berlye, and Gordon. Business Dynamics. Indianapolis, IN: Bobbs-Merrill Company, 1982.

Gallion and Minnick. Dictation Material for Beginning Shorthand. Bloomington, IN: Beta Zeta Chapter, Delta Pi Epsilon, School of Business, Indiana University.

Getting a Job. Belmont, CA: Pitman Learning, Inc.

How to Get and Hold a Job, Apple or TRS-80. Chatsworth, CA: Opportunities for Learning, Inc.

Indexing and Filing Workbook, 3rd edition. Chatsworth, CA: The H.M. Rowe Company, 1979.

The Interview, Apple or TRS-80. Chatsworth, CA: Opportunities for Learning, Inc.

Kahn, Yerian, and Stewart. Filing Systems and Records Management. Hightstown, NJ: McGraw-Hill Book Company, 1971.

Kimbrell and Vineyard. Entering the World of Work. Bloomington, IL: McKnight Publishing Co., 1983.

Kurtz, Adams, and Vezeau. 10,000 Legal Words: Spelled and Divided for Quick Reference. Hightstown, NJ: Gregg Division/McGraw-Hill Book Company, 1971.

Kushner and Kelly. How to Find and Apply for a Job, 3rd edition. Cincinnati, OH: South-Western Publishing Company, 1980.

Leslie, Zoubek, and Condon. Speed Dictation with Previews in Gregg Shorthand, Series 90. Hightstown, NJ: Gregg Division/McGraw-Hill Book Company, 1978.

McIntosh and Welter. The Legal Secretary: An Office Job Simulation, Cincinnati, OH: South-Western Publishing Company, 1977.

Popham, Schrag, and Blockhus. A Teaching-Learning System for Business Education. New York, NY: McGraw-Hill Book Company, 1975.

Self Concept and Work, Apple or TRS-80. Chatsworth, CA: Opportunities for Learning Inc.

Stewart, Scharle, and Kahn. Progressive Filing, 9th edition. Hightstown, NJ: Gregg Division/McGraw-Hill Book Company, 1980.

Zedlitz. Getting a Job. Cincinnati, OH: South-Western Publishing Company, 1981.

AUDIO-VISUAL MATERIALS

Advancing on the Job. First for Basic Lifestyles, Society for Visual Education, Inc., 1345 Diversey Parkway, Chicago, Illinois 60614.

Applying for a Job. (Film No. 85209) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Basic Job Skills--Following Instructions. (Film No. 25410) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Basic Job Skills--Handling Responsibility. (Film No. 15904) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Finding and Getting a Job. First for Basic Lifestyles, Society for Visual Education, Inc., 1345 Diversey Parkway, Chicago, Illinois 60614.

Get That Job--Line Up Your Interview. (Film No. 68804) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Getting a Job. First for Basic Lifestyles, Society for Visual Education, Inc., 1345 Diversey Parkway, Chicago, Illinois 60614.

How to Write a Resume. Current Affairs, P.O. Box 426, 346 Ethan Allen Hwy., Ridgefield, Connecticut 06877.

Interview: Ready or Not. (Film No. 07312) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Job Interview--I Guess I Got the Job. (Film No. 12510) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Office Practice--Working with Others. (Film No. 33409) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Telephone Manners. (Film No. 53106) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

You and Your Job Interview. Guidance Associates, Communication Park, Box 300, Mount Kisco, New York 10549.

Your Job--Applying for It. (Film No. 42609) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Your Job--Finding the Right One. (Film No. 42509) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Your Job--Fitting In. (Film No. 42409) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Your Job--Getting Ahead. (Film No. 42309) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

Your Job--You and Your Boss. (Film No. 42109) Audiovisual Instructional Materials for Virginia's Public Schools, Bureau of Teaching Materials, Department of Education, November, 1980.

ARTICLES, PAMPHLETS, BROCHURES

Basic Skills in Filling Out Forms. Career Aids, Inc., 8950 Lurline Avenue, Dept. K5, Chatsworth, CA 91311.

Basic Skills in Job Application. Career Aids, Inc., 8950 Lurline Avenue, Dept. K5, Chatsworth, CA 91311.

Grooming for Employment. Local Office, Virginia Employment Commission.

"An Intensive Approach to the Teaching of Punctuation in Shorthand and Transcription Classes." Journal of Business Education, January, 1979.

Merchandising Your Job Talents. Local Office, Virginia Employment Commission.

So You Want That Job. Local Office, Virginia Employment Commission.

"Typewritten Transcription--A Component of Shorthand Instruction." Shorthand--Perspective, Opinion, and Dialogue. Delta Pi Epsilon, Alpha Omega Chapter, Brigham Young University, 1974.

What Students Should Know About Interviewing. Local Office, Virginia Employment Commission.

CURRICULUM GUIDES

Behaviorial Objectives for Selected Units in Business Education. Hill and Schmidt (eds.), Virginia Department of Education, Richmond, Virginia, ED 095 418, 1975.

A Catalog of Performance Objectives, Criterion-Referenced Measures and Performance Guides for Legal Secretary and Court Reporter. Division of Business and Office Education and Curriculum Development Center for Kentucky, November, 1976.

Competency-Based Course Outlines for Business and Office Education: Basic Business Offerings. Division of Program Services, Department of Education, Commonwealth of Virginia, Richmond, Virginia, January, 1981.

Competency-Based Course Outlines for Business and Office Education: Secretarial, Stenographic, Typewriting, and Related Occupations. Division of Program Services, Department of Education, Commonwealth of Virginia, Richmond, Virginia, September, 1979.

Competency-Based Course Outlines for Business and Office Education: Specialized Occupational Offerings. Division of Program Services, Department of Education, Commonwealth of Virginia, Richmond, Virginia, January, 1982.

FBLA Co-Curricular Activities. Division of Vocational Education, Department of Education, Commonwealth of Virginia, Richmond, Virginia, September, 1976.

Guide for Integrating FBLA Into the Classroom. Division of Program Services, Department of Education, Commonwealth of Virginia, Richmond, Virginia, 1981.

Handbook for Legal Secretaries in Virginia. Michie Company Law Publishers, Charlottesville, Virginia, 1975.

Program of Studies for Business Education. Division of Program Services, Department of Education, Commonwealth of Virginia, Richmond, Virginia, 1982.

Virginia Chapter Future Business Leaders of America Handbook. Division of Program Services, Department of Education, Commonwealth of Virginia, Richmond, Virginia, 1979.